Reporter Roles **and EDX Access**

Employer Reporting Guide

This guide explains how to learn the EDX reporting system, create an account, log in, update your account, and understand your responsibilities.

Employer Service Center

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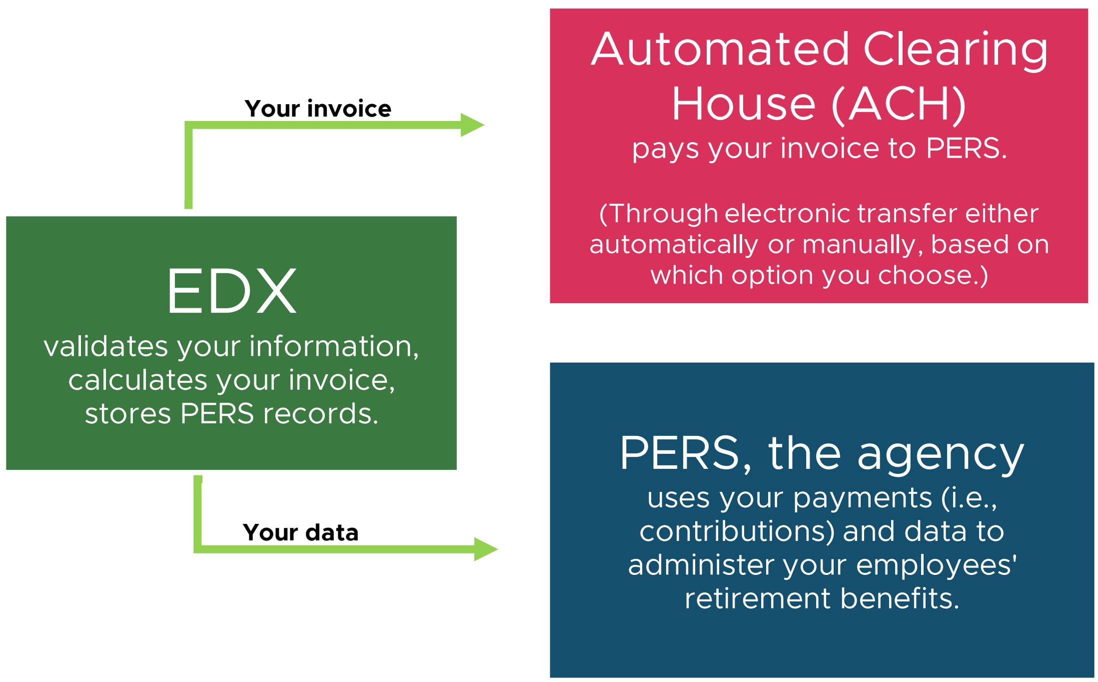
Introduction

Employer Data Exchange (EDX) is a secure, web-based tool that employers use to report their employees' hours, wages, and demographic information to PERS on a payroll-cycle basis.

EDX takes the financial information you feed it and automatically calculates what you owe each month to pay for your employees' future PERS benefits. It also validates and stores your employees' information, which PERS uses to calculate their benefits when they retire or withdraw.

The process flows like this:



EDX roles

Every employer must assign the following roles:

Web administrator. Every employer has one web administrator who is responsible for managing the employer's EDX account.

Employer reporter. Every employer has at least one employer reporter (who may also be the web administrator, in a small agency). Employer reporters are responsible for entering employee data into EDX.

These are the only roles who can access the employer's PERS account.

This guide explains the responsibilities of these two roles and how they can get started using EDX.

Learning how to use EDX

Every PERS-participating employer has a web administrator and up to 15 employer reporters authorized to use EDX. To help you learn how to use EDX, the PERS Employer Service Center (ESC) offers written manuals, instructor-led training, and on-demand training. Once you understand how to report in EDX, your ESC representative can help you answer questions and solve issues.

Educational resources

Click a resource name below to open the webpage for that resource.

- Employer reporting guides — series of instructional guides and quick-reference guides.
- Employer training — live, virtual training sessions led by an Employer Service Center expert.
- Employer Service Center representatives — answers to questions and one-on-one assistance.

PART 1 — THE WEB ADMINISTRATOR

Overview

For an overview of the role of the web administrator, watch "The Role of the Web Administrator" video. Click the image below to open the video website on Vimeo.com or paste https://vimeo.com/871509023/43e631fd29 into your browser.

Getting started

The web administrator is assigned the role by their organization's "reporting official." The reporting official is someone in their organization who has the authority to make financial decisions, such as the agency head, principal, fire chief, chief financial officer, or board member.

Getting an account

A new web administrator must request an account from PERS as follows:

1 Fill out the Web Administrator Agreement form. For instructions, read the Web Administrator Agreement Form Instructions web page.

2 Print the form, sign it, and have your reporting official sign it.

The reporting official is the head of the organization or someone who makes financial decisions. The form cannot be signed by the outgoing web administrator.

3 Scan the form and email the image to the PERS Employer Service Center at pers.edx.support@pers.oregon.gov.

An ESC representative will ensure you filled out the form correctly and had it signed by a reporting official who has financial authority at your agency. They will then email you a web admin user ID and a temporary password.

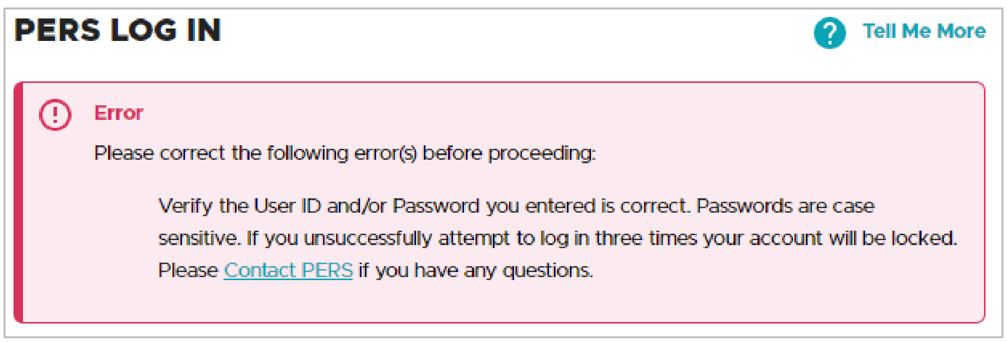
Logging in

You can now log in to EDX. Enter your user ID and password and hit Enter or click **Log In**.

Troubleshooting your account

Trouble logging in

If you enter the wrong user ID or password, you will receive an error warning, as shown in the image below.



If you enter an incorrect password and/or user ID three times, EDX will lock your account and display the message below.

Multiple unsuccessful log in attempts. Your account is now locked.

Please contact PERS at PERS.EDX.Support@pers.oregon.gov to reset your account.

Unlocking your account

Contact the Employer Service Center (ESC) to have your account unlocked. You can email the Employer Support inbox or contact your ESC representative.

Changing your password

Passwords expire after 90 days, requiring you to create a new one. Fifteen days before your password expires, a warning message (like the one shown below) will start appearing at the top of the Employer Home Page screen to tell you how many days remain before your current password is invalid.

> **Warning**
>
> Your password will expire in 8 days. To update your password: click on the 'Update My Profile' link, enter your password in the password field and the confirm password field, and then click 'OK'

Before your password expires, you can update it by selecting **Update My Profile** from the main Site Navigation. Enter and confirm your new password.

Your password must be composed of the following.

- At least seven characters.
- Three of these character types:
  a. An uppercase letter (A–Z).
  b. A lowercase letter (a–z).
  c. A numeral (0–9).
  d. A special character (e.g., !, #, @, %).

It must not contain three or more consecutive characters from your user ID.

Changing your expired password

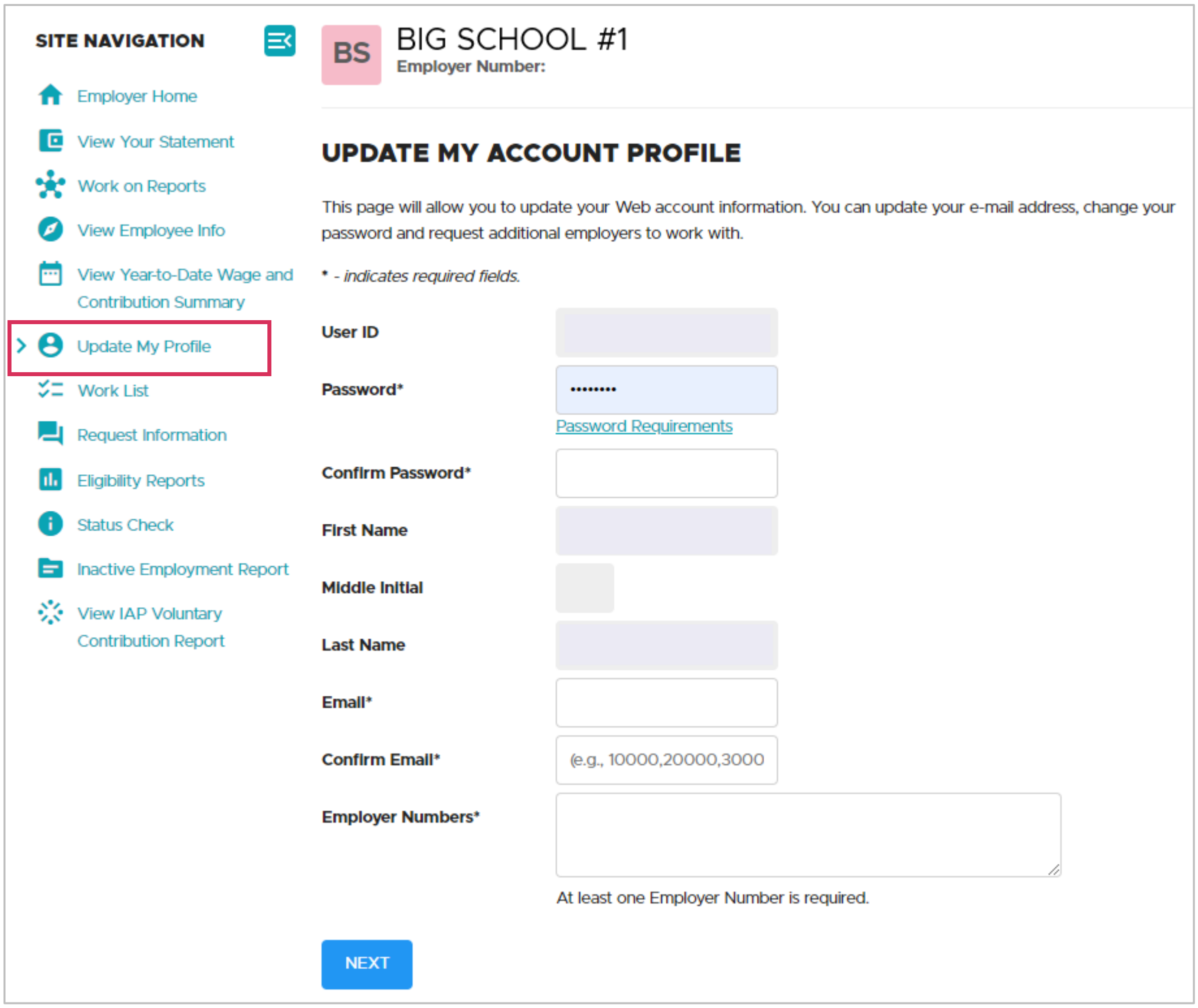
If you do not change your EDX password before it expires, the next time you try to log in, EDX will prompt you to enter a new password.

If EDX will not allow you to enter a new password, contact ESC for help.

Updating your account information

To change your email address, update your password, or add employers to your list, use the Update My Profile function.

On the Update My Account Profile screen, enter your new information, add any other required information, and click **NEXT**. (Required fields are marked with an asterisk.)



Managing EDX access

The web administrator serves a vital role that goes beyond unlocking accounts and managing contacts. They are also responsible for protecting the security of your EDX account and access to the personnel data in that account.

The person in this role:

- Controls the employer's EDX account.
- Updates the contacts on the Employer Contacts screen. Only the people listed as an employer contact may discuss the agency's account with PERS.
- Controls the employer reporter accounts (up to 15 accounts).
- Activates, inactivates, and resets employer account passwords.
- Unlocks accounts.

Managing the contacts list

Web administrators are responsible for assigning the following reporting roles to specific personnel (if they exist in the organization). These roles cannot access or change employer data through EDX, but they must be listed on the contact list to allow PERS to discuss your organization's account with them.

Reporting Official — Typically the head of the organization or someone authorized to make financial decisions for the organization.

Personnel — Typically the PERS contact in the Human Resources department.

Payroll — Typically the PERS contact in the Payroll department.

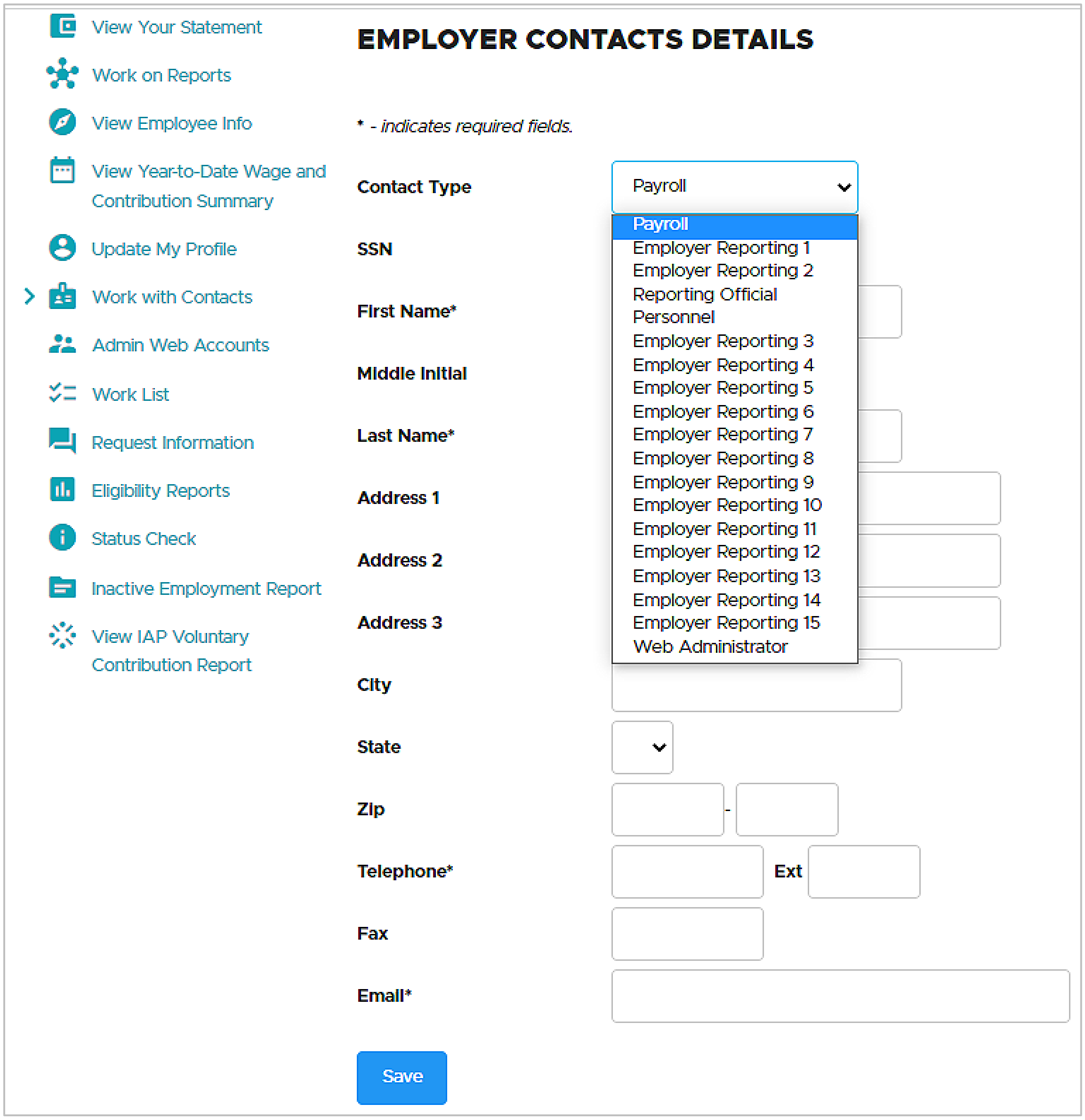
Other — Anyone an employer chooses to list as another contact.

Third-party administrator (TPA) access

If a web administrator authorizes a TPA (e.g., a certified public accountant) to have EDX access or be listed as a contact, it is up to the web administrator to ensure the TPA understands the EDX reporting process.

How to add a contact

1. Log into EDX.
2. Choose the **Work with Contacts** function from the main menu to open the Employer Contacts screen.
3. Click the **Add a New Employer Contact** button to display the Employer Contacts Details screen.
4. Click on the Contact Type pull-down menu and select a contact type from the list. (See image on next page.)
5. Type the person's information into the required First Name, Last Name, Telephone, and Email text boxes.
6. Click the **Save** button. You are returned to the Employer Contacts screen.


View Your Statement
Work on Reports
View Employee Info
View Year-to-Date Wage and Contribution Summary
Update My Profile
Work with Contacts
Admin Web Accounts
Work List
Request Information
Eligibility Reports
Status Check
Inactive Employment Report
View IAP Voluntary Contribution Report
EMPLOYER CONTACTS DETAILS
* - indicates required fields.
Contact Type
Payroll
Payroll
Employer Reporting 1
Employer Reporting 2
Reporting Official
Personnel
Employer Reporting 3
Employer Reporting 4
Employer Reporting 5
Employer Reporting 6
Employer Reporting 7
Employer Reporting 8
Employer Reporting 9
Employer Reporting 10
Employer Reporting 11
Employer Reporting 12
Employer Reporting 13
Employer Reporting 14
Employer Reporting 15
Web Administrator
SSN
First Name*
Middle Initial
Last Name*
Address 1
Address 2
Address 3
City
State
Zip
Telephone*
Ext
Fax
Email*
Save

How to edit contact information

1 Click on the **Work with Contacts** function. The Employer Contacts screen opens.

2 Click a contact type in the Contact Type column to select that person. The Employer Contacts Details screen opens, displaying the details of the selected contact.

3 To change a contact's type, click the Contact Type drop-down menu and choose a role.

4 To change demographic information, enter the new information in the appropriate box.

Note: The web administrator cannot change a contact's name or Social Security number. Contact your ESC representative to request this change.

5 Click **Save** at the bottom of the screen.

How to delete a contact

Any time someone on your Employer Contacts list is no longer serving as an employer contact, they need to be removed from your list.

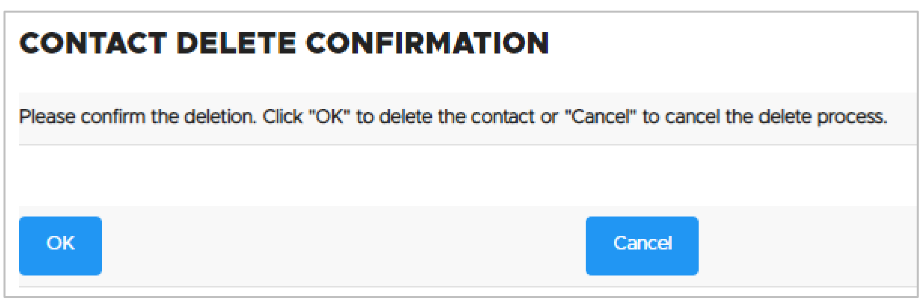
Note: This applies only to contacts who *do not* have EDX access. To remove a contact who has EDX access, go to the "How to In-Activate an Employer Reporter Account" section in this guide.

To delete a contact:

1 Follow steps 1 and 2 under "How to Edit Contact Information" above.

2 Click the **Delete** button at the bottom of the screen.

3 The Contact Delete Confirmation screen asks you to confirm the deletion. Click **OK** to delete the contact.



Managing employer reporter accounts

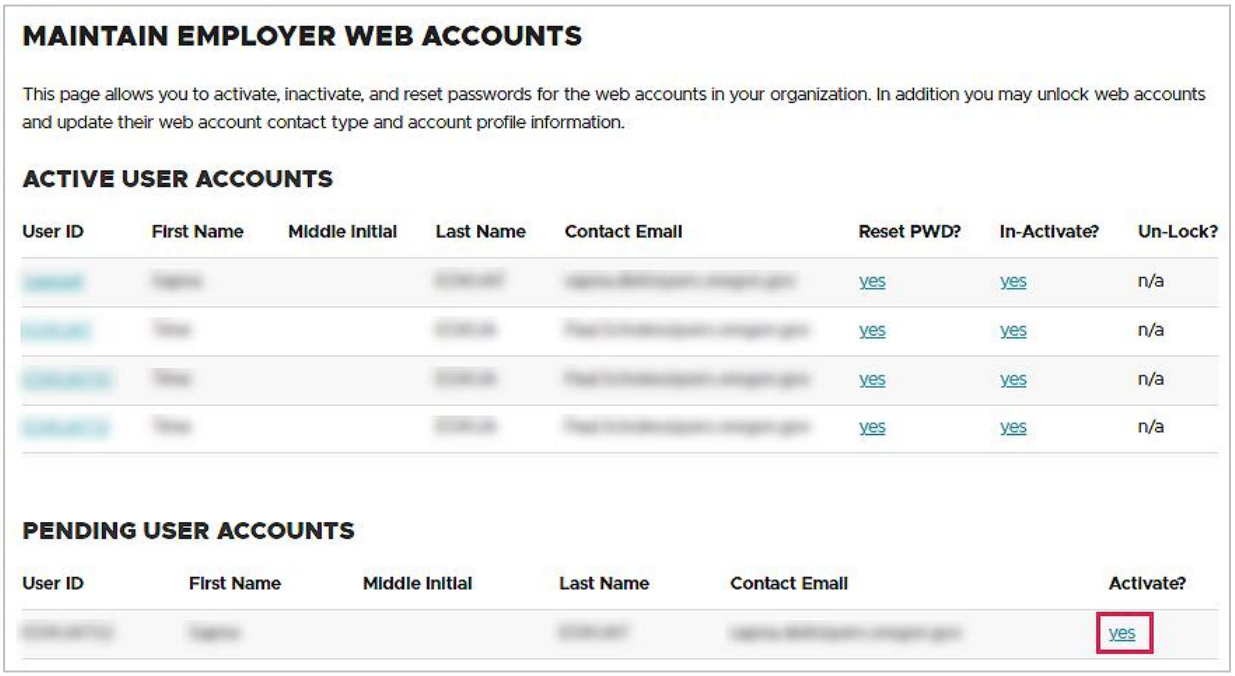
How to activate an employer reporter account

As the web administrator, it is your responsibility to take appropriate measures to verify the identity of anyone requesting access to the EDX system before activating an employer reporter account.

1 Log into EDX.

2 Select the **Admin Web Accounts** function to open the Maintain Employer Web Accounts screen.

3 Locate the new user’s account under the Pending User Accounts section. Click the “yes” link under the Activate? column that corresponds to that account. The Choose a Contact Type screen opens.



MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
[illegible]	[illegible]		[illegible]	[illegible]	yes	yes	n/a
[illegible]	[illegible]		[illegible]	[illegible]	yes	yes	n/a
[illegible]	[illegible]		[illegible]	[illegible]	yes	yes	n/a
[illegible]	[illegible]		[illegible]	[illegible]	yes	yes	n/a

PENDING USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
[illegible]	[illegible]		[illegible]	[illegible]	yes

4 Click the Contact Type pull-down menu and select the contact type you want to apply to the new employer reporter account.

5 Click the **Create** button to open the Status Change Confirmation screen.

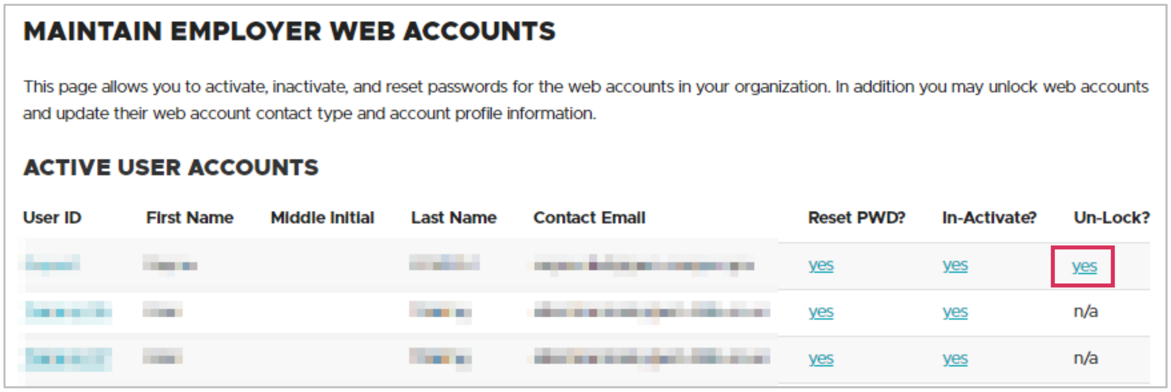
6 The Status Change Confirmation screen confirms the account status is now active.

7 Notify the new user that the account is now active. The user can immediately log on to EDX.

How to unlock an employer reporter account

1 Under the Site Navigation menu, select **Admin Web Accounts**. The Maintain Employer Web Accounts screen opens.

2 On the Maintain Employer Web Accounts screen, view all the user accounts in your agency and their statuses. This screen enables you to activate, in-activate, and unlock accounts by clicking "yes" in the appropriate row and column.



MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
					yes	yes	yes
					yes	yes	n/a
					yes	yes	n/a

How to in-activate an employer reporter account

Any time an employer reporter steps down from the role, you need to in-activate their account so they no longer have EDX access.

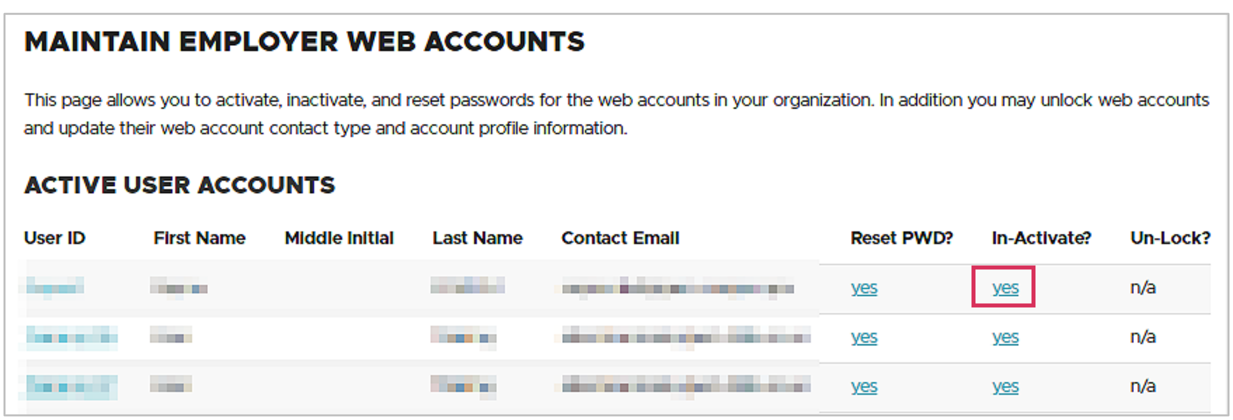
Note: A web administrator cannot in-activate another web administrator — only PERS staff can do that. To in-activate a web admin account, contact your ESC representative.

1 Log into EDX.

2 Choose the **Admin Web Accounts** function. The Maintain Employer Web Accounts screen opens.

3 Under the Active User Accounts section, locate the account you want to inactivate. Click the "yes" link under the In-Activate? column corresponding to that account.

4 The Status Change Confirmation screen confirms the account status is now inactive.



MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
					yes	yes	n/a
					yes	yes	n/a
					yes	yes	n/a

PART 2 — THE EMPLOYER REPORTER

Overview

For an overview of the role of the employer reporter, watch “The Role of the Employer Reporter” video. Click the image below to open the video website on Vimeo.com or paste https://vimeo.com/896704158/3e2ea25cd5 into your browser.

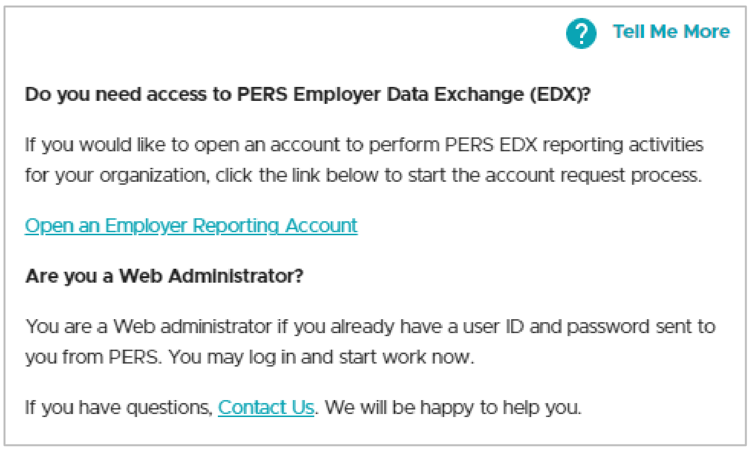
Getting started

Getting an account

A new employer reporter can set up their own account in EDX. It requires approval from the web administrator to get activated.

1 Go to the PERS Log In page. Do not log in.

2 Click “Open an Employer Reporting Account.” The Employer Reporting Account Creation screen opens.



3 Fill in account information. Click **Next**.

User ID: must not be claimed by anyone else and must be at least six characters long. Most often, it is your last name and first initial (e.g., DoeJ).

Password: must be composed of the following.

- At least seven characters.
- Three of these character types:
  a. An uppercase letter (A–Z).
  b. A lowercase letter (a–z).
  c. A numeric character (0–9).
  d. A special character (e.g., !, #, @, %).

4 Review your information. If it’s correct, click **Save Account**. If you need to fix something, click **Cancel** to return to the previous screen.

5 Notify your agency’s web administrator that you have submitted a request to open an account.

Once your web administrator activates your account, they will notify you.

If you requested access to multiple employers, each employer’s web administrator must activate your account before you can access their information.

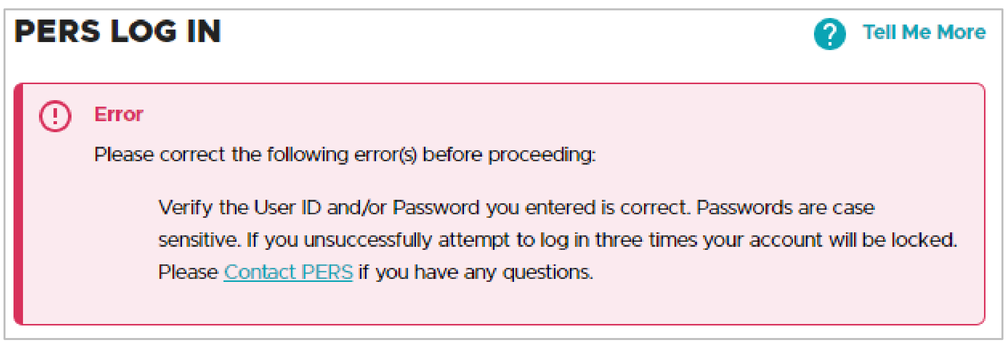
Logging in

Enter your user ID and password and hit Enter or click **Log In**.

Troubleshooting your account

Trouble logging in

If you enter the wrong user ID or password, you will receive an error warning as shown in the image below.



If you enter an incorrect password and/or user ID three times, EDX will lock your account and display the message below.

Multiple unsuccessful log in attempts. Your account is now locked.

Unlocking your account

Contact your web administrator and ask them to unlock your account. If they are unavailable, contact ESC for help.

Updating your account information

To change an unexpired password, update your name or email, or add a new employer number to your list, go to the **Update My Profile** function.

Changing your password

Passwords expire after 90 days, requiring you to create a new one. Fifteen days before your password expires, a warning message (like the one shown below) will start appearing at the top of the Employer Home Page screen to tell you how many days remain before your current password is invalid.

> **Warning**
>
> Your password will expire in 8 days. To update your password: click on the 'Update My Profile' link, enter your password in the password field and the confirm password field, and then click 'OK'

Before your password expires, you can update it by selecting **Update My Profile** from the main Site Navigation and filling in the required information.

1 Select Update My Profile to open the Update My Account Profile form.

2 Type your new password in the Password text box and also in the Confirm Password text box.

Your new password must be at least seven characters and contain three of these character types:

a. An uppercase letter (A–Z).
b. A lowercase letter (a–z).
c. A numeral (0–9).
d. A special character (e.g., !, #, @, %).

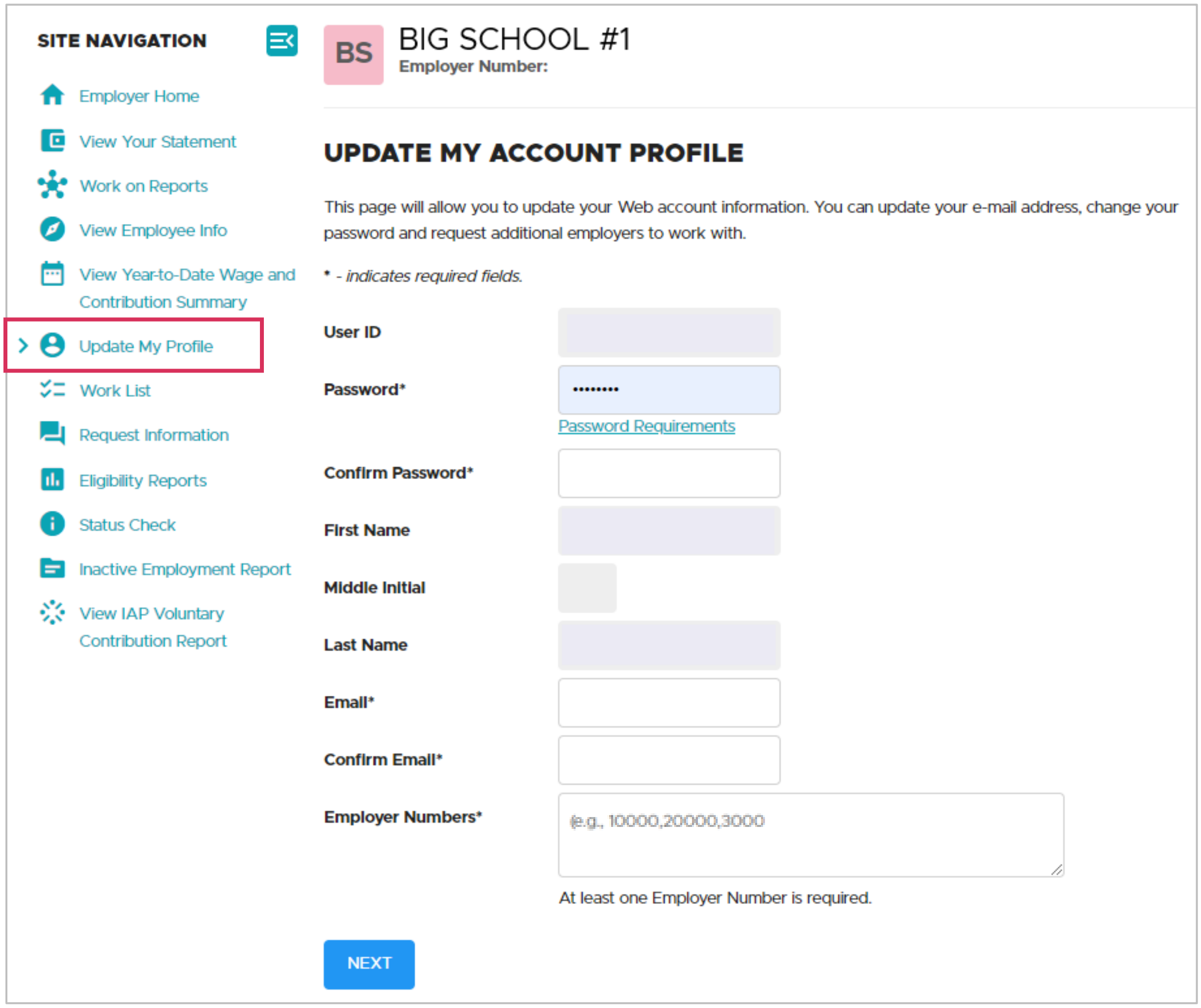
3 Click **NEXT**.

In the Update My Account Profile form (shown on next page), enter your new password and any other required information (fields with an asterisk are required) and click **NEXT**.

Passwords must be a minimum of seven characters and must contain three of the following character types:

a. An uppercase letter (A–Z).
b. A lowercase letter (a–z).
c. A numeral (0–9).
d. A special character (e.g., !, #, @, %).

Also, the password you type must not contain three or more consecutive characters from your user ID.



Changing your email

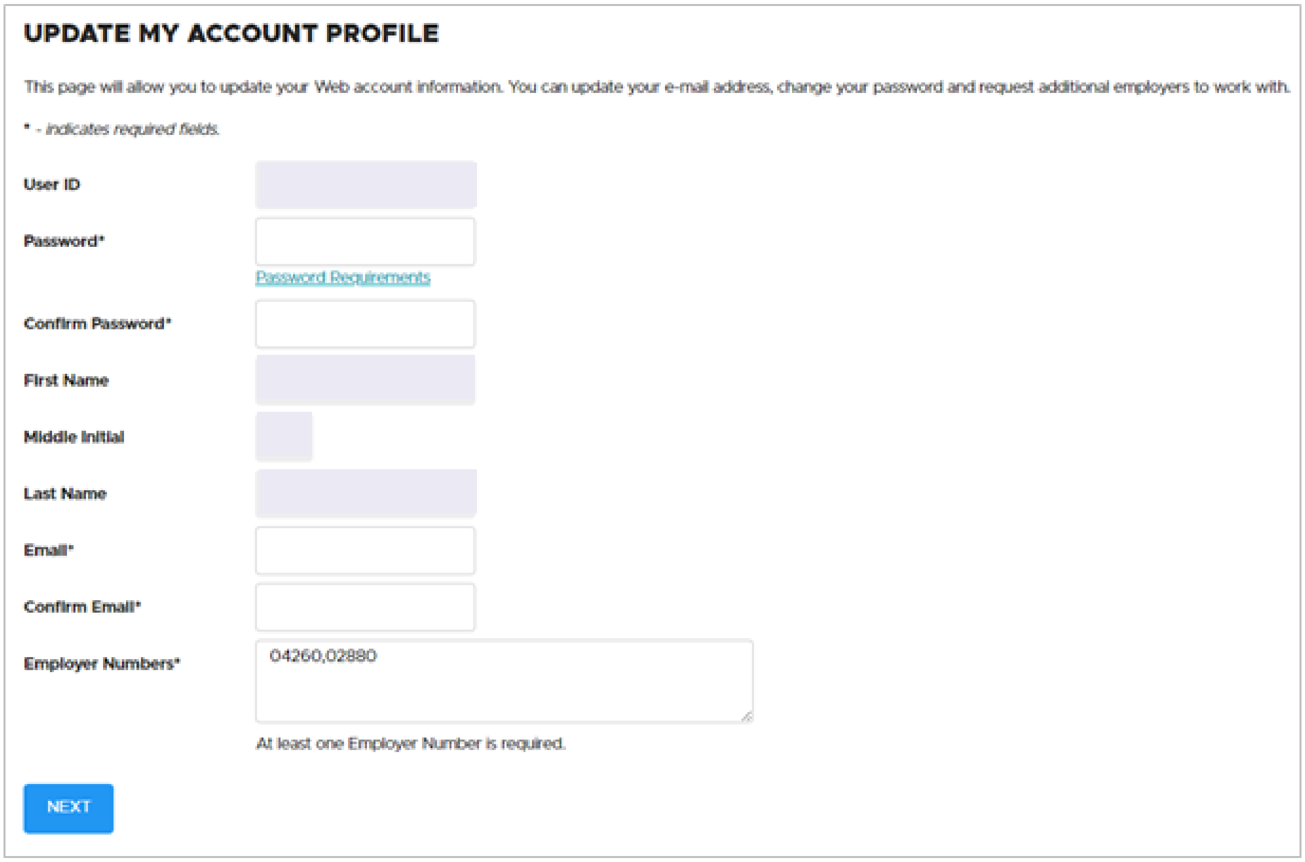
On the Update My Account Profile screen, enter your new email address, confirm the email address, and click **NEXT**.

Adding an employer number

Each employer is assigned a five-digit employer number that begins with a zero. To add a new employer number to your list, go to **Update My Profile** and add a new employer number at the end of your list of employers in the Employer Numbers box. Enter the new employer number separated by a comma with no space. Click **NEXT**.

Before an employer reporter can access the new employer's information, their web administrator for the new account needs to approve the addition. The web admin will not receive a notification, so the reporter may want to notify them of the request.

To approve the addition of an employer number, the web administrator for the new account selects **Admin Web Accounts** from the Site Navigation. They then “activate” the change to the account.



UPDATE MY ACCOUNT PROFILE

This page will allow you to update your Web account information. You can update your e-mail address, change your password and request additional employers to work with.

* - *indicates required fields.*

User ID

Password*

Password Requirements

Confirm Password*

First Name

Middle Initial

Last Name

Email*

Confirm Email*

Employer Numbers*

04260,02880

At least one Employer Number is required.

NEXT

Changing your expired password

If you do not change your EDX password before it expires, the next time you try to log in, EDX will prompt you to enter a new password.

If EDX will not allow you to change your password, contact the Employer Service Center to request a password reset. You have three options for contacting the ESC:

1. Call the ESC Call Center (8:30 a.m. to 12 p.m. Monday through Friday) at 888-320-7377.
2. Email PERS EDX Support.
3. Call or email your ESC representative.

Reporting to PERS

Employer reporters are the main users of EDX. They use the system at least every payroll cycle to enter employees' wages and hours worked. In between payroll cycles, they use EDX to report a new employee, change an employee's job status, run reports, and fulfill information requests from PERS.

The PERS system is complicated and, therefore, EDX is complicated, too. It is picky about the information you enter and how you enter it because incorrect information can have important consequences, such as:

- Incorrect employer billing.
- Inaccurate member accounts.
- Financial impacts (e.g., late fees, prior-year earnings).
- A long retirement process delayed by PERS staff needing to manually correct errors in an employee's account.

Learning how to report

Reporting to PERS is a complex process. A reporter needs to understand the EDX system and the PERS statutes and rules, which have many exceptions. To help reporters learn how to report properly, the Employer Service Center offers a range of training and educational materials.

Reporting employee hours, wages, and contributions

Employer reporting guides

4, *Creating a Report*.

5, *Creating a Record*.

9, *Reporting Wages for a Qualifying Employee*.

10, *Reporting Wages for a Non-Qualifying Employee*.

Quick-reference guides

Choosing the Best Record and Report Types.

EDX Wage Codes

Training manuals

Beginner Employer Reporting training manual 1

Beginner Employer Reporting training manual 2

Reporting demographic information and status changes

Employer reporting guides

7, *Reporting a New Employee*.

8, *Hiring a PERS Retiree*

11, *Reporting a Leave*.

12, *Military Leave*.

13, *Family and Medical Leave*.

14, *Disability Benefits*.

15, *Reporting a Termination or Death*.

16, *Reporting a Retirement*.

17, *Calculating Unused Sick Leave Hours at Termination or Retirement*.

18, Reporting or Changing 'Average Overtime.'

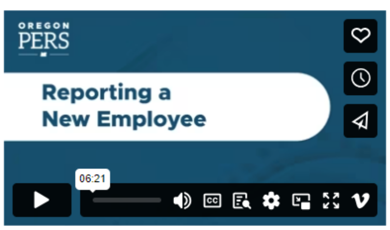
20, *Creating a Demographic Correction Request*.

Videos

"Reporting a New Employee" video.

"The Role of the Web Administrator" video.

"The Role of the Employer Reporter" video.



Running reports

Employer reporting guide 24, *Running Reports*.

Correcting suspended records

Employer reporting guide 6, *Correcting Suspended Records*.

Getting reporting help

Your ESC representative is there to answer questions, help solve problems, and support you in the very important, and complex, process of PERS reporting.

If you don't know who your PERS employer representative is, email PERS.EDX.Support@pers.oregon.gov and ask.