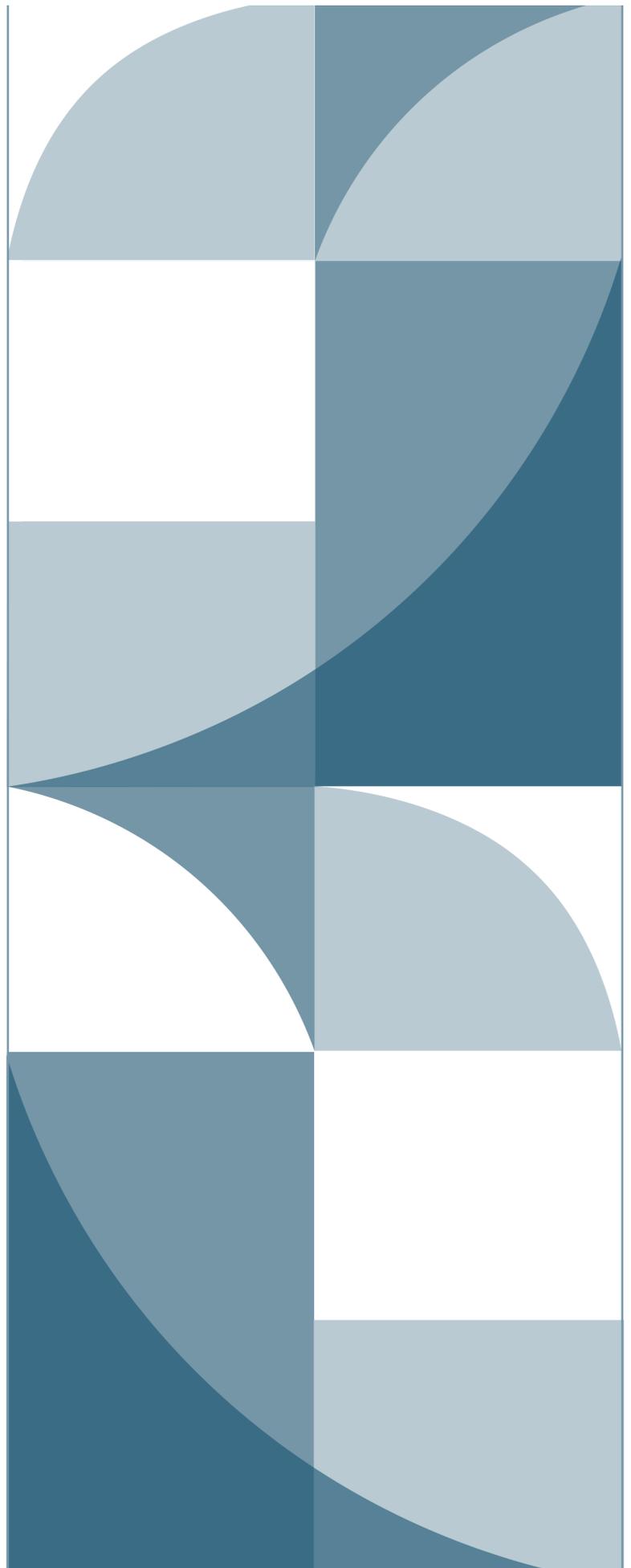


# Running Reports

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**



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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  |
|---|--|
| <b>Inactive Employment</b>                | Employees for whom you haven't reported wages in at least the last three months.   |
| <b>Eligibility</b>                        | Employees whose eligibility to earn PERS benefits may have changed.  |
| <b>Year-to-Date Wage and Contribution</b> | Employee wages and contributions paid on those wages for a calendar year.  |
| <b>Status Check</b>                       | <p>Status of employees for whom PERS is expecting contributions. Also indicates if they elected to make voluntary contributions.</p> <p>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.</p> |
| <b>IAP Voluntary Contribution</b>         | Employees who have opted to make contributions to their Individual Account Program (IAP) account to make up for the amount redirected to their Employee Pension Stability Account (EPSA).  |

# 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.

The screenshot shows the user interface for the Inactive Employment Report. On the left is a 'SITE NAVIGATION' sidebar with a list of menu items. The 'Inactive Employment Report' item is highlighted with a red box. The main content area is titled 'INACTIVE EMPLOYMENT REPORT' and includes a 'Tell Me More' link. Below the title, there is a description of the report and a 'Download CSV File' button. A 'TELL ME MORE' section provides additional context and details about the data included in the CSV file.

**SITE NAVIGATION**

- Employer Home
- 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

**BS** BIG SCHOOL #1  
Employer Number:

### INACTIVE EMPLOYMENT REPORT

[Tell Me More](#)

This report lists all employees who have open employment segments and appear to be inactive.

Inactive Employment Report [Download CSV File](#)

#### TELL ME MORE

This report is for informational purposes only and is intended to list employees that may need terminations reported to PERS through EDX. No action is taken by PERS.

The "Download CSV File" button will pull the following information into a CSV file: PERS ID, SSN, last name, first name, middle initial, last pay date, hire date and contribution start date.

## RUNNING REPORTS

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- 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. Run the following two eligibility reports to look for employees who are approaching 600 hours and may qualify for benefits and members who are coming up short on hours and may not qualify.

**Note:** The Members with Contributions Who May Not Qualify 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. No action is needed for these members. You are only looking for employees who are nearing the end of a year.

## Running the report

- 1 Begin by selecting Eligibility Reports from the Site Navigation.

The screenshot shows a web interface for 'BIG SCHOOL #1' with Employer Number: 06000. On the left is a 'SITE NAVIGATION' menu with 'Eligibility Reports' highlighted in a red box. The main content area is titled 'EMPLOYEE ELIGIBILITY EXCEPTION REPORTS' and includes a 'Tell Me More' link. Below the title is explanatory text and a 'Filter your report by year' input field with the placeholder 'Enter a year (YYYY)'. Two buttons labeled 'Download CSV File' are visible for 'Members Approaching Qualifying Hours' and 'Members with Contributions Who may not Qualify'. A 'TELL ME MORE' section at the bottom explains that employees listed are for informational purposes only and reports run for the current year and two years prior.

- 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 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.

- 4** If any of the employees on 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.

# 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.

The screenshot displays the employer portal interface for 'BIG SCHOOL #1' (Employer Number: 06000). On the left, the 'SITE NAVIGATION' menu includes options like 'Employer Home', 'View Your Statement', 'Work on Reports', 'View Employee Info', 'Update My Profile', 'Work with Contacts', and 'Admin Web Accounts'. The 'View Year-to-Date Wage and Contribution Summary' option is highlighted with a red box. On the right, the 'FILTER YOUR REPORT BY YEAR' section contains a text box for entering a year (YYYY) and a 'Submit' button. A descriptive paragraph explains that the report shows data reported to PERS for each employee during the target year, based on submitted data.

- 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.

### YEAR-TO-DATE WAGE AND CONTRIBUTION SUMMARY

Year 2022  
Today 11/30/2022

Search By SSN

 Search

[View Original Results](#) [View Totals](#) [Download as CSV](#)

Prev **1** 2 3 4 5 6 7 8 9 10 11 12 13 14 15

Filter By Last Name

On this screen, you can:

- Search for an employee by entering their 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*

## RUNNING REPORTS

- 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.”

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.

|  |  |  |  |            |            |                  |          |        |
|--|--|--|--|------------|------------|------------------|----------|--------|
|  |  |  |  | 10/17/2016 | 05/01/2017 | Posted           | 508.56   | 0.00   |
|  |  |  |  | 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   |
|  |  |  |  | 08/15/2013 | 03/01/2007 | Posted           | 945.02   | 0.00   |
|  |  |  |  | 08/15/2016 | 03/01/2016 | Posted           | 1,024.53 | 0.00   |
|  |  |  |  | 08/15/2022 | 03/01/2023 | Posted           | 244.01   | 0.00   |
|  |  |  |  | 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 |            |            |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
|--|------------|------------|------------------|------------------------|----------------------|-----------|----------|--------------|-------------|--------------------|-----------------|---------------------|--------------|--------|----------|--------|--------------------|-----------------|------------------|
| <a href="#">Return to Summary</a>                |            |            |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| Year   |            | 2022       |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| Today  |            | 11/30/2022 |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| SSN  |            |            |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| Member Name                                      |            |            |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| Contribution Start Date                          |            | 05/01/1997 |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| <a href="#">Download as CSV</a>                  |            |            |                  |                        |                      |           |          |              |             |                    |                 |                     |              |        |          |        |                    |                 |                  |
| 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

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. For a more detailed status check, contact your [ESC representative](#).

For example, if you have an employee who also works part-time for other employers, the employee will qualify for benefits if all their hours combined equal 600 or more a year.

## Running the report

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

**SITE NAVIGATION**

- Employer Home
- 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

**BS** BIG SCHOOL #1  
Employer Number: 06000

### STATUS CHECK MEMBER SEARCH

[? Tell Me More](#)

Search for a member to display their member contribution status.

Last Name

SSN

**Search**

**? TELL ME MORE**

The contribution status message is based on the current member account status. A member account status can change at any time.

The message "Expecting contributions" makes the assumption that the member will work or is currently working with qualified hours.

**IAP Voluntary Contribution Effective Date** - The date when a member's IAP Voluntary Contribution Election takes effect. Employers are responsible for withholding after-tax IAP Voluntary Contributions from their employees' paychecks on and after this effective date.

- 2 Enter the member's last name or SSN and click **Search**.

The Status Check Member Search screen displays the contribution status for that member and the PERS plan 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 to advance from page to page.

### STATUS CHECK MEMBER SEARCH ?

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  |
|--------|-----------|------------|------------|--|
| ██████ | CHO       | ██████     | PERSTier 2 | Expecting contributions.                                     |
| ██████ | CHO       | ██████     | OPSRPDB    | Expecting contributions.                                     |
| ██████ | CHO       | ██████     | OPSRPDB    | Not expecting contributions; currently serving waiting time. |

Columns

**Plan**

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

**Contribution Status**

- **Expecting contributions:** The employee is eligible for contributions if they are in a qualifying position (i.e., if they work 600 hours or more). If the employee is in a non-qualifying position (i.e., if they work fewer than 600 hours), no contributions are due.
- **Not expecting contributions:** The employee is in a non-qualifying position 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, contact PERS. It could be due to retirement, loss of membership status, or prior 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 More

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 |
|------------|-----------|------------|------------|--|---|
| [REDACTED] | CHO       | [REDACTED] | PERSTier 2 | Expecting contributions.                                     | N/A                                       |
| [REDACTED] | CHO       | [REDACTED] | OPSRPDB    | Expecting contributions.                                     | 02/01/2021                                |
| [REDACTED] | CHO       | [REDACTED] | 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. 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 run a report of employees who have opted to make voluntary contributions, choose View IAP Voluntary Contribution Report from the main menu.

The screenshot shows the 'VIEW IAP VOLUNTARY CONTRIBUTION REPORT' page. On the left is a 'SITE NAVIGATION' sidebar with various options, where 'View IAP Voluntary Contribution Report' is highlighted with a red box. The main content area shows the employer's name 'BIG SCHOOL #1' and number '06000'. Below this is the report title and a 'Tell Me More' link. A description states the report lists employees with IAP Voluntary Contribution Election(s). There is a 'Filter your report by year' section with a text input field and a 'Download CSV File' button. A 'TELL ME MORE' section provides additional details about the report's informational purpose, year restrictions, and the data included in the CSV file.

## RUNNING REPORTS

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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.