Four steps to 100% posted reports

Getting the most out of your year-end efforts

page 1 steps | page 2 instructions

1. Correct suspended records.

To get unposted reports to post, correct all your suspended records — one by one.

This triggers your invoice payments, ensuring up-to-date accounting and Individual Account Program (IAP) earnings **paid by the PERS Fund**.

2. Run an Eligibility Exception report.

Run a Members Approaching Qualifying Hours report for two main reasons:

1. Correcting position type before March 5 **saves you money**. Your organization will be charged for 2025 IAP earnings owed on all pay dates posted after March 5, 2026, and contributions paid after March 12, 2026.
2. Making major changes is **much easier** before the year ends. Data are fresher and the process is as simple as submitting a Demographic Correction Request (DCR). As of 2025, some changes to a past year (i.e., closed year) require proof.

3. Check your Work List.

To help your retirees have a **smooth retirement process**, make sure to check your Work List as soon as you receive an email notifying you of a new request.

In fact, it is good practice to check it any time you are in EDX — your employees' benefit calculations and payments may depend on it.

4. Create an Inactive Employee list.

Create this list to check for inactive employees who you may need to terminate.

Employers who include an Inactive Employee list in their year-end clean-up efforts get **better overall results**. They are more likely to get all their reports posted, and their employees get more accurate member annual statements. Errors like overstated service credit get corrected before statements are printed.

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Instructions

How to correct suspended records.

In EDX, go down your lists of unposted Regular reports and Demographic and Adjustment reports and “edit” them to correct the errors. Click Save. Check the next day to ensure they have posted.

Tip: Refer to employer guide 6, *Correcting Suspended Records*, to find causes of and solutions for common error messages.

How to run an Eligibility Exception report.

Run a Members Approaching Qualifying Hours report for 2025. The report lists employees in non-qualifying positions who may qualify to earn benefits. This is important because it is a major change to an employee’s account.

If you find employees who reached 600 hours before December 31, 2025, submit a DCR requesting a position type change to active service.

Tip: Where to find step-by-step instructions.

- Eligibility Exception report instructions: employer guide 24, *Running Reports*.
- DCR instructions: employer guide 20, *Creating a DCR*.
- Changing qualification status: employer guide 9, *Reporting Wages for a Qualifying Employee*, and 10, *Reporting Wages for a Non-Qualifying Employee*.

How to check your Work List.

Select Work List from the EDX main menu. This opens the Work List screen where you can access your Work List items.

Learn more in employer guide 19, *Completing Work List Requests*.

Tip: Remember that only the person assigned Employer Reporting 1 or your web administrator receives your organization’s EDX emails. Web administrator: If you have multiple employer reporters, ensure someone has the role of Employer Reporting 1.

How to create an Inactive Employee list.

As instructed in employer guide 24, *Running Reports*, create the list to find employees who are no longer working for you. Then submit termination reports to update your list of active employees.

Tips: The Inactive Employee list looks for all employees for whom you have not reported hours and wages in the last three months. Seasonal employees, school employees on summer break, and employees on a leave of absence may also appear on the list. Working PERS retirees do not appear on the list; contact ESC if you need a list of inactive working retirees.

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