



Welcome to **PERS** **Reporting**

Employer Reporter Welcome Guide

*The purpose of this
guide is to introduce
you to your new
employer-reporting role
and explain the resources
available to help you
perform this important task.*

**Employer
Service
Center**

Welcome to PERS reporting

Employer reporters play a vital role.

You are the link between your fellow employees and PERS. By submitting employee information to PERS accurately, correctly, and on time, you ensure that your employees will receive all the retirement benefits they earned over a career serving Oregon and its citizens.

This document provides an overview of what you need to know to perform the employer reporter role.

Contents

The Employer Data Exchange system

Employer roles

Support

Training

Staying informed

About PERS

Getting started

The Employer Data Exchange system

[Employer Data Exchange \(EDX\)](#) is the secure web portal that PERS employer reporters use to report employee information to PERS.

Using EDX, you will:

- Submit, review, and change employee data.
- Submit the hours worked and wages earned by your payroll.
- Report job status changes, like leave without pay, a new position, or retirement.

Learning how to use EDX

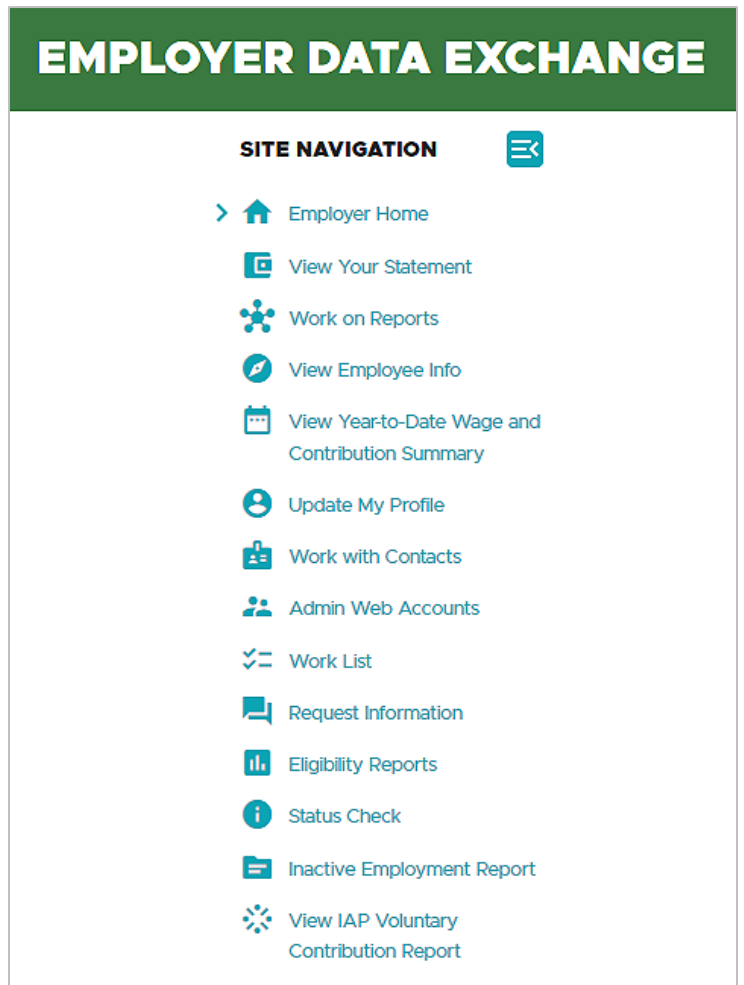
Instructor-led training: If you're new to employer reporting, go to the [Training webpage](#) and sign up for a virtual, instructor-led course.

Instructional guides: You can also start by reading the first few [employer reporting guides](#), which cover the basics of reporting:

- Guide 3, *Reporter Roles and EDX Access*.
- Guide 4, *Creating a Report*.
- Guide 5, *Creating a Record*.

Once you learn the basics, refer to guides 6 through 28 and the eight quick reference guides to conduct specific reporting tasks.

Online training: The agency is currently working to create online instructional videos that walk you through all the steps of reporting in EDX. We will let you know when these are ready.



Employer roles



Every PERS-participating employer has people assigned to two employer reporting roles: web administrator and employer reporter.

For more information about these roles and how they get an EDX account, read [employer reporting guide 2, *Employer Requirements and Support*](#).

Web administrator

The web administrator controls employer reporter accounts and:

- Activates, deactivates, and resets employer account passwords for EDX.
- Unlocks accounts and updates account profile information.
- Manages the employer's EDX contacts list.

Employer reporter

The employer reporter uses EDX to report payroll-cycle information in accordance with your organization's payroll schedule (i.e., weekly, biweekly, or monthly). The employer reporter also reports status and demographic updates in EDX, including:

- New employees.
- Employees who are going on leave, terminating, or retiring.
- Changes to employee demographics and previously reported information.
- Requests to PERS to update information only PERS can change.

Support

EDX reporting support



The PERS Employer Service Center (ESC) is staffed with PERS-reporting experts who help employers report their data correctly.

The staff is split into three teams that specialize on these employer types:

- 1 Local governments (such as fire departments, cities, and special districts).
- 2 State agencies.
- 3 Schools, universities, and community colleges.

Every employer is assigned an ESC account representative. If your representative is unavailable when you need help, you can contact any member of your ESC account team. ESC representatives' phone numbers and email addresses are listed on the [ESC Representatives webpage](#).

How to contact ESC

For quick questions and status checks, call the Employer Call Center line at 888-320-7377 between 8:30 a.m. and 12:00 p.m. Pacific Time

For in-depth questions and assistance, call your ESC account representative as instructed on the [ESC Representatives webpage](#).

What ESC does

The focus of the ESC is assisting employers who are having challenges reporting through EDX, such as:

- Reporting demographic, wage, and hour information.
- Conducting status checks.
- Correcting suspended records.

ESC representatives can access your employer account and work with you to fix issues and find the information you need. If you need help or information not related to reporting, our employer representatives will make sure you get to the right person at PERS to get your questions answered.

Who ESC supports

ESC only assists PERS-participating employers. They cannot support PERS members with questions about their personal PERS accounts.

If your employees have questions about their retirement accounts, they can call the **Member Information Center** (MIC) at 888-320-7377 (option 1) on weekdays between 8:30 a.m. and 5 p.m. Pacific Time.

Financial reporting support



There are two other PERS teams that your organization may occasionally need to contact for financial reports or documents often requested by auditors. If you are unsure if your question should go to one of these teams, consult with your ESC representative.

The Actuarial Activities Section

What they do

The Actuarial Activities Section team members, alongside PERS consulting actuaries:

- Establish employer contribution rates.
- Develop actuarial assumptions.
- Determine the PERS system's funded status.

How they support you

If you have questions about your rate or how a change in your payroll may affect your rate, Actuarial Activities can help you.

How to reach them

Email the Actuarial Activities Section at actuarial.services@pers.oregon.gov.

Given the complexity of actuarial topics, the team prefers to be contacted by email so they can provide a detailed response, if needed. They are available to answer emails Monday through Friday 7 a.m. to 3 p.m. Pacific Time.

The Financial Reporting Section

What they do

The Financial Reporting Section works with Oregon Treasury to apply final credited earnings to employer reserves, prepare PERS' Annual Comprehensive Financial Reports (ACFR), and prepare the annual Governmental Accounting Standards Board (GASB) 68 and 75 documents in partnership with PERS consulting actuaries.

How they support you

This team can answer questions about final earnings crediting and GASB reporting.

How to reach them

For information about earnings crediting, email the Financial Reporting Section at FRS.mailbox@pers.oregon.gov.

If you have questions about GASB, email PERS.GASB.questions@pers.oregon.gov. They are available to answer emails Tuesday through Friday 7 a.m. to 3 p.m. Pacific Time.

Training



ESC provides group and individual training for employer reporters at all experience levels. To learn more, go to the [PERS Employer Training webpage](#).

Staying informed

PERS helps employers stay apprised of changes, additions, and status updates through the PERS website and emailed publications. PERS publications are sent from the address OregonPERS@public.govdelivery.com.

PERS Employer website

The [Employers section](#) of the PERS website provides all the resources employers need, including training, guides, forms, publications, and videos.

PERS emails

To specify the types of emails you want to receive, go to the [GovDelivery website](#) and log in by entering your email address and clicking Submit. Select the Questions tab (you may need to click the [subscriber preferences](#) link to access the page with the tabs).

Scroll down and answer the question, “What is your job function as it relates to PERS?” Answer any other optional questions and then click Submit.

Subscriber Preferences

Subscriptions

Preferences

Questions

Publications

Employer News. This monthly newsletter provides news, information, and instructions for employer reporters, HR professionals, benefits departments, and agency heads. Each issue is [posted to the PERS website](#).

Employer News Bites. Occasionally, PERS needs to send employers information that can't wait until the next newsletter. News Bites are sent by email through GovDelivery and posted on the right side of the [Employer News webpage](#).

Perspectives ([Tier One/Tier Two editions](#), [OPSRP editions](#)). *Perspectives* is a newsletter emailed to nonretired (i.e., still working) and retired PERS members three times a year.

Sign up to receive *Perspectives* and other PERS news and publications through [GovDelivery](#).



Educational manuals



Employer reporting guides and quick references. This series of 28 reporting guides and 10 quick-reference guides explains PERS benefits and provides step-by-step instructions for PERS reporting information. The guides are downloadable and printable. [Go to guides and quick references.](#)

Unfunded Actuarial Liability Resolution Program (UALRP) actuarial guides.

The UALRP guides help employers understand actuarial concepts and rate-management resources. Topics are contribution rates, valuation reports, unfunded actuarial liability (UAL), employer pools, financial modeling, and pension obligation bonds. [Go to UALRP guides.](#)

Reports

Actuarial valuation reports. Every year, PERS publishes actuarial valuation reports for every PERS-participating employer, in addition to a system-wide valuation report. Reports generated in even years are used to set rates for the next biennium; reports generated in odd years are advisory. [Access valuation reports online.](#)

PERS Annual Comprehensive Financial Report (ACFR). This report shows the financial performance of PERS and the retirement plans it administers for the previous fiscal year. It is published every year and posted on the PERS website. [Access the ACFR online.](#)

PERS Popular Annual Financial Report (PAFR). A condensed and simplified version of the ACFR for readers who are not finance professionals. [Access the PAFR.](#)

PERS By the Numbers. An annual report on PERS data and demographics, such as the number of members, system funding status, how much each tier costs the system, and how much of their prior salary retirees are earning. [Read the PBTN.](#)

PERS Governmental Accounting Standards Board (GASB) reports. This webpage provides GASB 68 frequently asked questions (FAQ) and reports plus a GASB 75 toolkit and resources. [Go to GASB webpage.](#)

Popular forms

[Web Administrator Agreement.](#)

[Authorization Agreement for Employer ACH Debits.](#)

[PERS Employer ACH Agreement.](#)

[Employer website](#)>Forms menu: for all other employer forms.

Form instructions

[General instructions for filling out and submitting a form.](#)

[Certification of Individual Contract \(CIC\) form instructions.](#)

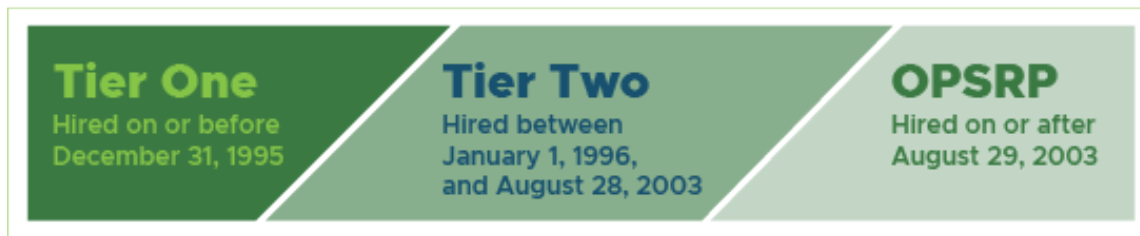
[Employer Data form instructions.](#)

[Web Administrator Agreement form instructions.](#)

About PERS

The Oregon Public Employees Retirement System (PERS) is a pension program for Oregon public employees that was established in 1946. About 900 state government, public schools, community colleges, and local governments (cities, counties, and special districts) participate in PERS, which covers about 95% of public employees in Oregon — about 405,000 people.

PERS is separated into three plans based on when employees were hired: Tier One, Tier Two, and Oregon Public Service Retirement Plan (OPSRP). Each plan provides a pension, an Individual Account Program (IAP) account, and other benefits that vary by plan.



Job classifications within those plans (e.g., General Service, Police and Fire, and School Employee) receive slightly different benefits.

How PERS works

To learn more about how PERS works:

- Read [employer reporting guide 1, Overview of PERS](#).
- Watch the video “[How Does PERS Work?](#)” to understand how different Oregon entities work together to manage PERS.



Getting started



Now that you have been introduced to PERS and the employer reporter role, you are ready to dive into PERS reporting.

To get started, make use of the resources explained in this guide.

Open the [Checklist for New Employer Reporters](#) and check off each step in your to-do list.

Email pers.edx.support@pers.oregon.gov to ask who your ESC representative is (if needed) and ask to sign up for an EDX training course.

Check out the [employer reporting guides](#) to understand PERS and your reporting role.

And reach out to your [Employer Service Center representative](#) whenever you need help.