Checklist for new employer reporters

Each step below includes a link or links to information or instructions. Note that employer guides are PDF documents that you can read online, print, or download.

Learn the basics

- [ ] Understand PERS plans and retirement benefits (read employer guide 1).
- [ ] Set up an EDX account (choose a user ID and password).
- [ ] Attend reporter training (view options).
- [ ] Learn how to create a report (read employer guide 4).
- [ ] Learn how to create a record (read employer guide 5).

Understand how and when to pay your bill

- [ ] Know your electronic funds transfer (EFT) method (read Paying for PERS).
- [ ] Know your remittance statement due dates (also called ACH transfer dates).

Start reporting in EDX

- [ ] Report employee hours and wages on Regular report dates (learn how to submit a Detail 2 record, understand differences between non-qualifying positions and qualifying positions).
- [ ] Submit employee demographic changes, as needed (learn how to submit a Detail 1 record).
- [ ] Understand how to ask PERS to make certain demographic and status changes through Demographic Correction Requests (DCR) (read employer guide 20).
- [ ] Report employee status changes —
  - New employees (employer guide 7), including average overtime hours (employer guide 18).
  - Change of position from qualifying to non-qualifying (employer guide 9).
  - Change of position from non-qualifying to qualifying (employer guide 10).
  - New PERS retiree hires (employer guide 8).
  - Unpaid leaves (employer guide 11).
  - Terminations and deaths (employer guide 15), including reporting unused sick leave hours (employer guide 17).
  - Retirements (employer guide 16).