

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



October webinar

Eligibility Exception Reports

October 21, 2026

Employer Service Center Training



Agenda

- PERS terms
- Changing position type
- Employee Eligibility
Exception reports
- Interpreting the results
- Question-and-answer (Q&A)

PERS terms

- Hire intent versus position type

PERS terms

Hire intent versus position type

Hire intent: Qualifying and Non-Qualifying

Who determines it?

Human Resources (HR) rep, hiring manager, or other at your organization.

How is it determined?

Ask: Is this job normally intended or expected to require 600 or more hours in a full calendar year?

- Ask it — at the time your organization hires the employee.
- Base it — on number of hours this position/job usually requires or what HR/manager expects it to require in a calendar year.
 - **Qualifying hire intent** (Q) → position requires 600+ hours.
 - **Non-qualifying hire intent** (NQ) → position requires fewer than 600 hours.
- Enter it — on the Detail 1 new hire record, Status Code field.

PERS terms

Hire intent versus position type

Position type: Active Service and Non-Qualifying Service

How is it determined?

Original position type matches hire intent. If hours of position change, position type changes.

Non-qualifying changes to active if employee either:

- Already worked 600 or more hours/calendar year.
- Will work 600 or more in the year.

Active changes to non-qualifying if employee either:

- Already worked fewer than 600 hours/calendar year.
- Will work fewer than 600 hours in the year.

	Position A	Position B
Original number of annual hours	800	580
Hire intent	Qualifying	Non-qualifying
Position type	Active service	Non-qualifying service
Number of annual hours for the year	580	620
Hire intent (unchanged)	Qualifying	Non-qualifying
Position type (changed)	Non-qualifying service	Active service

Changing position type

- Submit a Demographic Correction Request (DCR)

Changing position type

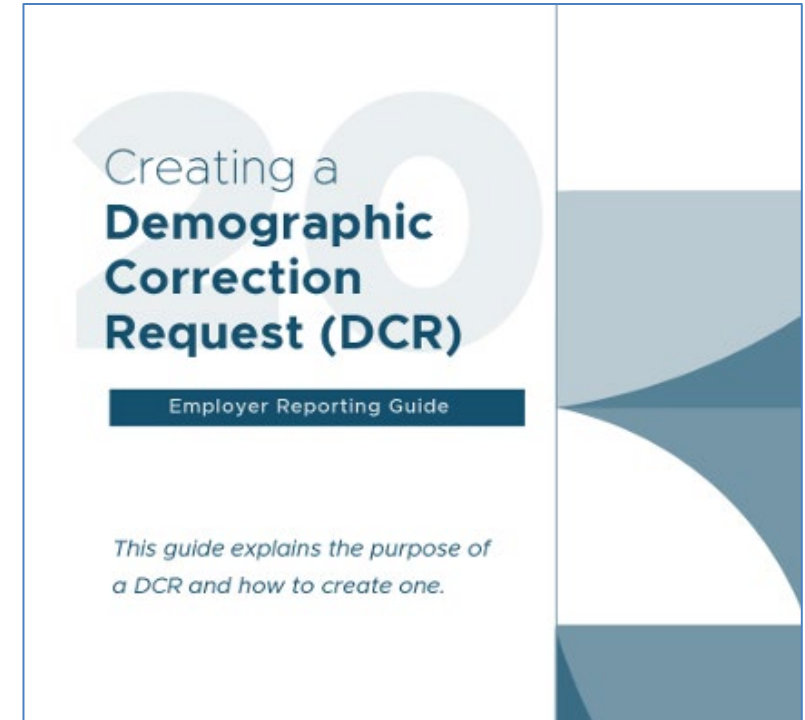
Submit a DCR

Only PERS can change an employee's position type.

If a report shows that an employee needs their position type changed to active service or non-qualifying service based on hours worked in the calendar year, **submit a Demographic Correction Request (DCR)** asking a PERS staff member to make this change.

If you have a large list, work with your ESC account representative to change several employees at once.

For DCR instructions, go to [employer guide 20, Creating a Demographic Correction Request](#).



Employee Eligibility Exception reports

- Two types of reports
- Who runs them and when
- How to run the two types of reports
 - Members Approaching Qualifying Hours
 - Members With Contributions Who May Not Qualify

Eligibility Exception reports

Two types of reports

An eligibility report checks for employees whose eligibility for PERS benefits may have changed because they have worked more or fewer hours than expected that calendar year.

EMPLOYEE ELIGIBILITY EXCEPTION REPORTS

 [Tell Me More](#)

The reports below can be used to determine if corrective action is required to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions.

Please note that these reports are only updated once a week. When viewing the CSV file, the header row will state the date the information was pulled from the system.

Filter your report by year

Enter a year (YYYY)

Members Approaching Qualifying Hours

 [Download CSV File](#)

Members with Contributions Who may not Qualify

 [Download CSV File](#)



Eligibility Exception reports

Two types of reports

The **Members Approaching Qualifying Hours** report shows members who:

- Are non-qualifying
and
- Have 550 or more hours reported in that year.

Therefore, may (or did) reach 600 hours in the specified year.

The **Members with Contributions Who may not Qualify** report shows members who:

- Are qualifying (or active service)
and
- Have fewer than 600 hours reported in that year.

Therefore, may not (or did not) reach 600 hours in the specified year.

Eligibility Exception reports

Who runs them and when

Employer reporters

and

Employer Service Center (ESC)
account representatives are able to
run both reports.

Members Approaching Qualifying
Hours report

ESC representatives — every month.

Employer reporters — every month is great.

*Most important to start in July and each
month through the end of the year.*

Proactively, June is even better, if able.

Eligibility Exception reports

Who runs them and when

Error message

If you do not run these reports and a non-qualifying employee is getting close to 600 hours, the wage record that puts them at or over 600 hours may show as suspended with this error message:

Type of error	Example message explaining the error
S: Suspended	<i>S - Employee has 600 or more hours of service reported in the plan year; wage code '02 - Regular/Non-Qualifying' may not be used.</i>

Eligibility Exception reports

How to run the two types of reports

Instructions

- 1 Select Eligibility Reports from the main menu.
- 2 Enter the current year in the **Filter your report by year** box.
- 3 Choose **Download CSV File** for the report type or types that you want.

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

EMPLOYEE ELIGIBILITY EXCEPTION REPORTS

[? Tell Me More](#)

The reports below can be used to determine if corrective action is required to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions.

Please note that these reports are only updated once a week. When viewing the CSV file, the header row will state the date the information was pulled from the system.

Filter your report by year
Enter a year (YYYY)

Members Approaching Qualifying Hours [Download CSV File](#)

Members with Contributions Who may not Qualify [Download CSV File](#)

? TELL ME MORE

Employees listed in these reports are displayed for informational purposes only. No action is taken by PERS.

These reports will run for the current year and two years prior.

Interpreting the results

- How to read the report
- Exceeded hours
- Insufficient hours
- Partial-year rules
- Let ESC help

Interpreting the results

How to read the report

Members Approaching Qualifying Hours

	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Carter	Liam	68	0	580	0
4	xxx-xx-xxxx	Brooks	Emma	1077.33	0	0	0
5	xxx-xx-xxxx	Mitchell	Noah	590	0	0.75	0
6	xxx-xx-xxxx	Reynolds	Ava	3.5	0	957.75	0
7	xxx-xx-xxxx	Bennett	Elijah	0.03	0	672.75	0
8	xxx-xx-xxxx	Wallace	Sophia	32	0	558	0
9	xxx-xx-xxxx	Hunter	James	592.07	0	0	0
10	xxx-xx-xxxx	Coleman	Isabella	564.19	81.67	0	0
11	xxx-xx-xxxx	Grant	Lucas	137.01	0	395.01	438.01
12	xxx-xx-xxxx	Simmons	Mia	870.91	0	0	0
13	xxx-xx-xxxx	Hayes	Mason	1084.18	0	0	0
14	xxx-xx-xxxx	Foster	Amelia	470.67	127.33	8	0
				Column D Posted hours worked for this employer. All members on this report are approaching the 600-hour mark.	Column E Unposted hours worked for this employer shows hours worked this calendar year that have not posted.	Column F Posted other employer hours shows hours they have worked with another employer or employers this calendar year.	Column G Unposted other employer hours shows unposted hours worked for another employer or employers this calendar year.

TIP: You may find it most useful to pull the report after running payroll and submitting your Regular report, either at the end of the month or beginning of the next month.

Fictitious example, not real employees.

Interpreting the results

Exceeded hours

Example 1 — exceeding hours with two employers, posted + unposted hours

The Members Approaching Qualifying Hours report shows that for this year, employee Amelia has:

127.33 unposted hours with her employer (ER).

470.67 posted hours with her ER.

8 posted hours with another ER.

TOTAL: **606**

Her total exceeds 600 hours. Amelia is non-qualifying, so her position needs to be changed.

	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/05/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
14	xxx-xx-xxxx	Foster	Amelia	470.67	127.33	8	0

Interpreting the results

Exceeded hours

Example 2 — exceeding hours with two employers, no unposted hours but action may still need to be taken

Employee Liam was hired into a non-qualifying position with one employer (Employer X) to start the year. He worked **68** hours (column D).

Next, Liam was hired by a second employer (Employer Z) into a qualifying position.

Liam had a CSD (contribution start date) of 7/1/25 (from a prior employer)

He worked **580** hours (column F).

TOTAL: **648**

The Members Approaching Qualifying Hours report shows that Liam is over the 600 hours, but those hours do not appear in the Unposted Hours This ER column because, in this example, the second employer hired Liam into a qualifying position.

Continued next slide

Employer X					Employer Z		
	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Carter	Liam	68	0	580	0

Interpreting the results

Exceeded hours

Example 2 *continued*

Because Liam’s CSD was 7/1/25 and he worked 600 hours in the calendar year, Employer X would likely owe contributions retroactively for the year.

If his CSD were not in the past, then Employer X would not owe contributions retroactively.

ACTION: The first employer will likely owe contributions retroactively if there is a prior CSD, which we are using for this example of 7/1/25; position type would need to be switched to active service.

NOTE: Remember that when you look at these reports, hours listed can reflect many different scenarios. **These are examples, and each situation is different.**

Employer X					Employer Z		
	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Carter	Liam	68	0	580	0

Interpreting the results

Exceeded hours

Example 3 — exceeding hours with one employer

The Members Approaching Qualifying Hours report shows that non-qualifying employee Emma is over the 600-hour threshold.

Contributions may be due on her salary back to her start date or the beginning of the calendar year, whichever is later.

Results might be because of multiple employment segments; for example, being hired non-qualifying, terminated, then hired again as qualifying. System would have allowed wages to post going forward because it is an active segment.

Continued next slide

	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Carter	Liam	68	0	580	0
4	xxx-xx-xxxx	Brooks	Emma	1077.33	0	0	0

Interpreting the results

Exceeded hours

Example 3 *continued*

The non-qualifying segment is likely still showing as non-qualifying for the calendar year and needs to be switched to active service.

This could result in a CSD (contribution start date) change (most likely to 07/01/2026) and charges for retroactive contributions.

NOTE: Remember that this is an example of a specific situation; situations vary.

	A	B	C	D	E	F	G
1	Members Approaching QH			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Carter	Liam	68	0	580	0
4	xxx-xx-xxxx	Brooks	Emma	1077.33	0	0	0

Interpreting the results

Insufficient hours

Example 4 — Members with contributions who may not qualify

The employees listed on this report may not meet the required 600 hours this calendar year.

NOTES: Be aware that some may not reach 600 because of working a **partial year** (covered on next slide). Do not change the position type of these employees.

If any employees do not reach 600 hours for another reason, their position type would be changed to non-qualifying service, and your organization would be repaid the contributions you paid on their wages.

	A	B	C	D	E	F	G
1	Members with Contributions who may not Qualify Report			Employer - xxxxx		9/5/2026	
2	SSN	Last Name	First Name	Posted Hours This ER	Unposted Hours This ER	Posted Other ER Hours	Unposted Other ER Hours
3	xxx-xx-xxxx	Sam	Smith	503.94	0	0	0
4	xxx-xx-xxxx	April	Blanch	378.5	0	0	0
5	xxx-xx-xxxx	Ester	Wiggins	475.43	0	0	0
6	xxx-xx-xxxx	Blair	Capstone	340.2	0	0	0
7	xxx-xx-xxxx	Dean	Flagstaff	203.51	0	67.48	0
8	xxx-xx-xxxx	Silvia	Gentry	191.39	0	0	0

Interpreting the results

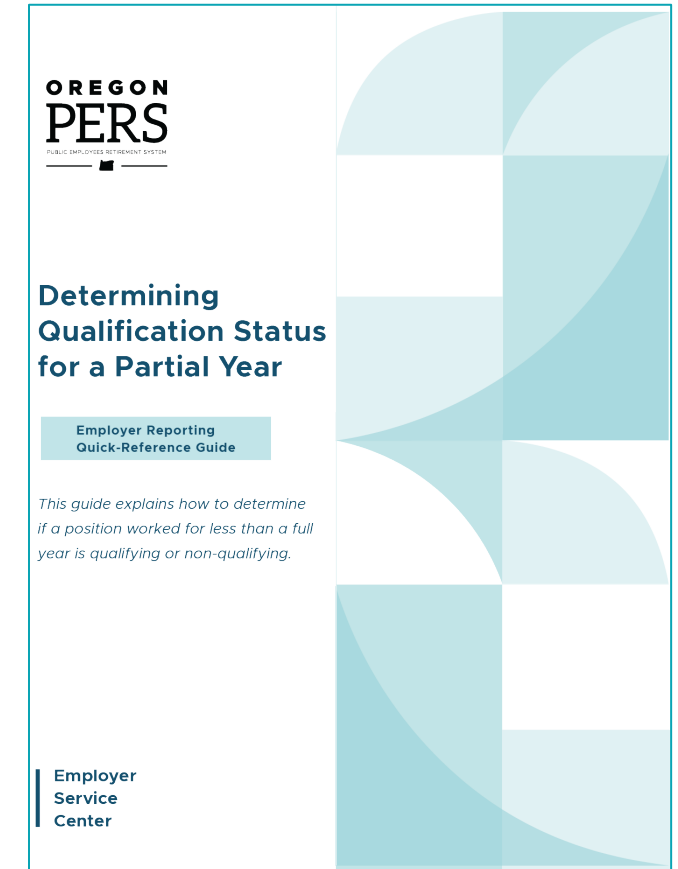
Partial-year rules

Employees who do not reach 600 hours because of working a partial year

A partial year is one in which an employee works **less than a full year** because of getting hired after the first of the calendar year or terminating before the end of the year. If an employee in a qualifying position does not reach 600 hours because of working a partial year, they are still qualifying that year.

Qualifying employees in this situation will appear on a **Members With Contributions Who May Not Qualify** report.

Therefore, you must verify the situation of each employee on the report to ensure you do not mistakenly change someone's qualification status to non-qualifying service.



For more, read the [Determining Qualification for a Partial Year](#) quick-reference guide.

Interpreting the results

Let ESC help

TIPS

- ☆ Do not hesitate to reach out and **work together** with ESC (Employer Service Center) on any aspect of these reports.
- ☆ Ask if you can send all your status changes in **one file** so that you don't have to submit each one individually in a DCR.
- ☆ Your account representative is here to help. **Request help** by email or phone. For in-depth help, set up a working session.

Question-and-answer (Q&A)

Q&A

How to ask a question

Two options:

1. Use the raise-your-hand feature and wait to be called on (preferred).
2. Enter your question in the chat.

Employer Service Center representatives are on hand to answer questions.

Important: Do not use employee names or mention any personally identifiable information.



After the webinar:
Send questions to
your [ESC
representative or
call the ESC Call
Center.](#)

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Thank you

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contact information](#)

