

# OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Summer webinar

## **Understanding Your Statement and Voluntary Contributions**

June 25, 2025

Employer Service Center Team



# Agenda

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- Quick reminders
- Understanding your statement
- Voluntary IAP contributions
- Questions and answers

# Quick reminders

## Status checks

### When

Every time you are preparing to report a new hire to PERS — whether it is qualifying, nonqualifying, or a retiree hire.

### Why

To find out if they are a member, work for other employers, are a PERS retiree, are doing voluntary contributions, and more.  
*The EDX status check does not show the whole picture.*

### How

By contacting Employer Service Center (ESC) or your representative by email (preferred) or phone.

Include employee's full name, birthdate, and last four digits of Social Security number.

#### Call Center

##### Hours

8:30 a.m. – 12 p.m., Monday to Friday (excluding holidays)

##### Phone

888-320-7377; select option 1, then option 2 to reach ESC

#### Representatives

##### Hours

8:00 a.m. – 5 p.m., Monday to Friday (excluding holidays)

##### Phone numbers and emails

Listed on [ESC webpage](#)

# Quick reminders

## Employer reporter accounts

Web administrators — all new reporters must create their **own accounts** to gain EDX reporting permissions.

Adding them as a contact only allows them to receive information about the account. It does not give them a reporting account nor EDX access.

**EMPLOYER CONTACTS DETAILS**

\* - indicates required fields.

Contact Type: Payroll (dropdown menu open)

SSN

First Name\*

Middle Initial

Last Name\*

Address 1

Address 2

Address 3

City

State

Dropdown menu options: Payroll, Employer Reporting 1, Employer Reporting 2, Reporting Official, Personnel, Employer Reporting 3, Employer Reporting 4, Employer Reporting 5, Employer Reporting 6, Employer Reporting 7, Employer Reporting 8, Employer Reporting 9, Employer Reporting 10, Employer Reporting 11, Employer Reporting 12, Employer Reporting 13, Employer Reporting 14, Employer Reporting 15, Web Administrator

**NOT  
LIKE  
THIS**

# Quick reminders

## Employer reporter accounts

The prospective employer reporter must request an account, then the web administrator activates it.


LIKE THIS


**Do you need access to PERS Employer Data Exchange (EDX)?**


If you would like to open an account to perform PERS EDX reporting activities for your organization, click the link below to start the account request process.


[Open an Employer Reporting Account](#)


**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

**MAINTAIN EMPLOYER WEB ACCOUNTS**

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

**PENDING USER ACCOUNTS**

User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
XXXXXXXXXX	John		DOE	john.doe@company.com	<a href="#">yes</a>

# Quick reminders

## Employer reporter accounts

How to establish an employer reporting account

### Employer reporter

- 1. Go to [EDX login page](#).
- 2. Click [Open an Employer Reporting Account](#).
- 3. Fill in the application.
- 4. Save. Inform your web administrator that you have completed the form and are ready for them to activate your account.

**Do you need access to PERS Employer Data Exchange (EDX)?**

If you would like to open an account to perform PERS EDX reporting activities for your organization, click the link below to start the account request process.

[Open an Employer Reporting Account](#)

### Web administrator

- 1. In EDX, select Admin Web Accounts function.
- 2. Activate the employer reporter’s account by following steps 3–7 in [employer guide 3, Reporter Roles and EDX Access](#), Part 1 — the Web Administrator, section “Managing EDX Access,” subsection “Managing Employer Reporter Accounts,” “How to Activate an Employer Reporter Account.”

PENDING USER ACCOUNTS					
User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
XXXXXXXX	John		Smith	john.smith@company.com	<div>yes</div>

# Understanding your statement

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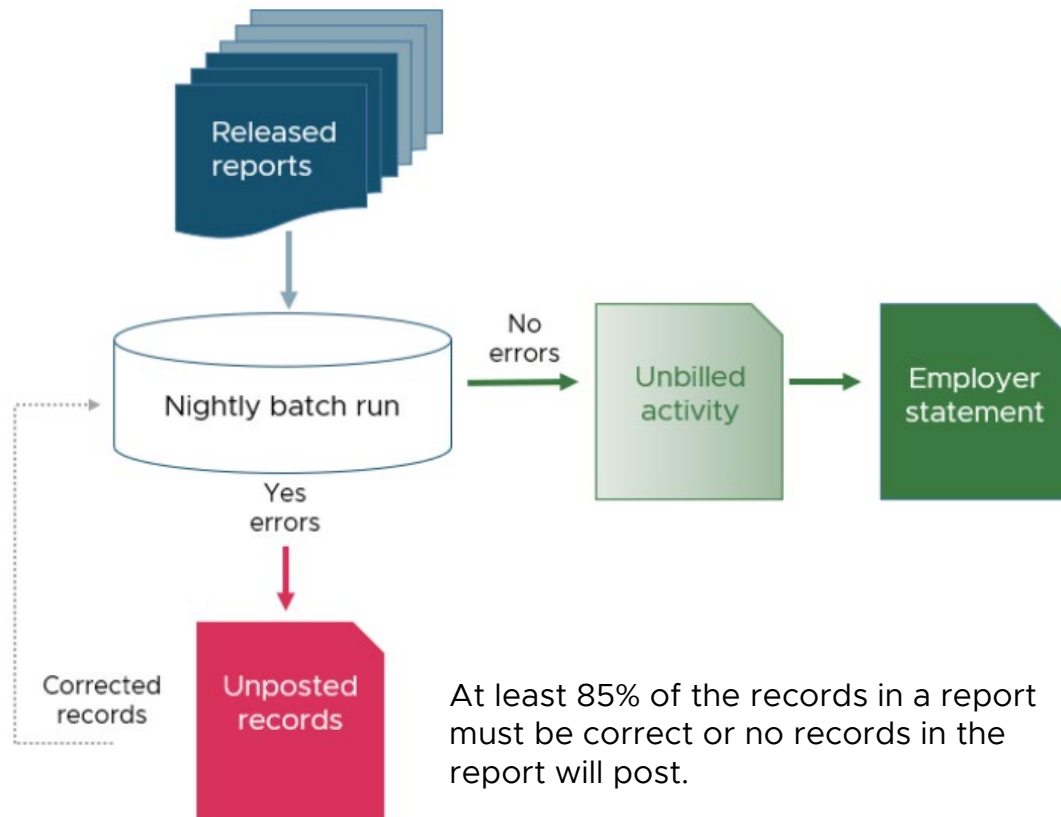
Receiving your statement

Statement sections



# Receiving your statement

## How your statement is generated



EDX processes the data you report (e.g., employee hours, wages, job status changes) every weeknight in a “**batch run**.”

During the batch run, EDX **validates** each record in each report to ensure that it is filled out correctly.

EDX **posts** the correct records and calculates any charges or credits based on the information in the records. It lists these charges and credits in your Unbilled Activity section until the next statement is generated.

If EDX detects a possible error in a record, it “**suspends**” the record and does not post it. The record does not affect your bill until it is corrected, resaved, and posted.

On the statement date (5<sup>th</sup> or 20<sup>th</sup>), EDX moves your unbilled activity to your “**remittance statement**.”



# Receiving your statement

## How you know it is ready

- EDX sends an automated email on the 5th and 20th of each month (or prior business day if weekend or holiday) stating that statement is available.
- Email goes to one of the following:
  - Person in role of Employer Reporting 1.
  - Web administrator (if no one is assigned Employer Reporting 1).
- Either role can log on to EDX to view the statement.



# Receiving your statement

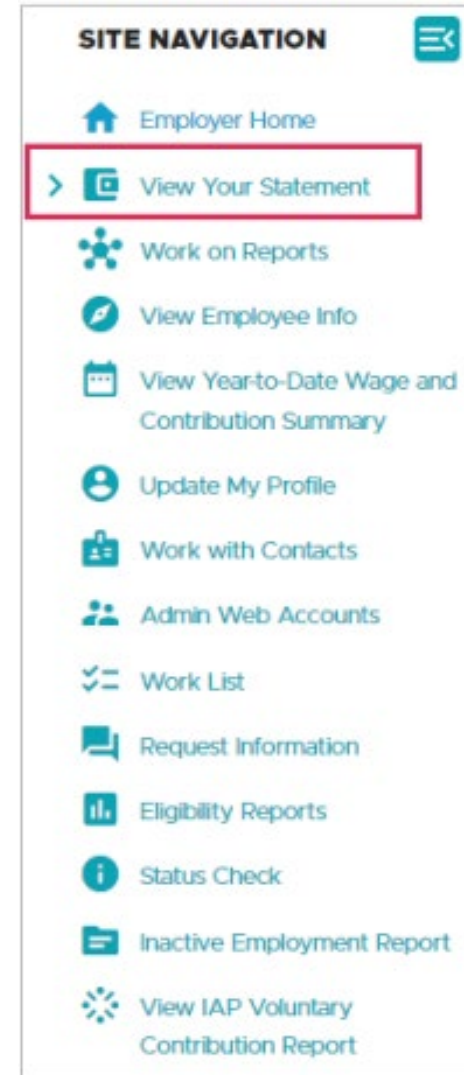
## Viewing your statement

Twice a month, EDX generates a new **employer statement**, which includes an invoice of charges for different categories of benefits.

The View Your Statement function is where you find your current and past employer statements. It has **five sections**, which are explained in more detail in employer guide 26, [employer guide 26, Understanding Your Statement](#).

Your statement has links to sections of your **invoice** that break it down into progressively greater detail, down to charges and credits per employee.

**Guide 26** explains how your statement is organized, the terminology used in your statement, and what each section of your statement contains.



# Statement sections

## Five sections of your statement

### View Your Statement sections

When you choose the View Your Statement function, the View Employer Statement or Wage and Contribution Report screen opens. This screen allows you to view your organization's current employer statement, unbilled activity since the last statement, old employer statements, and old wage and contribution reports. To access a section, click the tab.

The next five sections of this guide explain the contents of each section.



Excerpt from guide 26, *Understanding Your Statement*

# Statement sections

## Tab 1: Current contribution rates

Select **View Your Statement**. The View Employer Statement or Wage and Contribution Report screen opens. The Current Contribution Rates tab is the default.

This screen shows a breakdown of the **current contribution rates** you are paying for different categories of employees. You pay more for Tier One and Tier Two members, called “PERS,” and for Police and Fire job class members.

These rates are for **employees’ future pensions**; not their IAP accounts.

For explanations of normal cost, unfunded actuarial liability (UAL) rate, and other aspects of your rate, read the PERS actuarial manual [Guide to Understanding Your Rate](#).

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

CO COASTAL FIRE DISTRICT

Employer Number: 60000

**VIEW EMPLOYER STATEMENT OR WAGE AND CONTRIBUTION REPORT**

Tell Me More

This process allows you to view your organization's current Employer Statement, Unbilled activity since the last statement, history of your organization's Employer Statements, or history of your organization's Wage and Contribution Reports.

Current Contribution Rates

Employer Statement

Unbilled Activity

Employer Statement History

Wage and Contribution Report History

**YOUR CURRENT CONTRIBUTION RATES**

Rate Category	Normal Cost Rate Percentage	Combined UAL Rate Percentage	Net Rate Percentage
PERS General Service	13.01%	0.12%	13.13%
PERS Police & Fire	13.01%		13.13%
OPSRP General Service	7.94%		8.06%
OPSRP Police & Fire	12.30%		12.42%

Sample (fictional) View Employer Statement or Wage and Contribution Report screen

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# Statement sections

## Tab 1: Current contribution rates

### Rates table breakdown

YOUR CURRENT CONTRIBUTION RATES			
Rate Category	Normal Cost Rate Percentage	Combined UAL Rate Percentage	Net Rate Percentage
A PERS General Service	13.01%	D 0.12%	13.13%
PERS Police & Fire	13.01%		13.13%
B OPSRP General Service	7.94%		8.06%
OPSRP Police & Fire	12.30%		12.42%

**Notes:** Retirees who return to work remain in their original membership plan (Tier One, Tier Two, or OPSRP). The rate you pay is based on their plan and the job class of their current position (i.e., General Service, School Employee).

RHIA = Retirement Health Insurance Account

RHIPA = Retirement Health Insurance Premium Account

UAL = unfunded actuarial liability

Definitions of terms used in the table at right are in the [Glossary guide](#).


A	“PERS” refers to Tier One and Tier Two.
B	Employer rate paid on each employee depends on their membership plan and job class category.
C	Normal cost percentage includes pension normal cost and RHIA/RHIPA normal cost (PERS only).
D	Combined UAL rate percentage includes pension UAL rate, retiree healthcare UAL (no UAL for RHIA), and any additional surpluses, liabilities, and offsets, such as a side account.
E	Normal cost + combined UAL rate = net rate percentage. This is the rate you pay on all your working retirees and active members.
F	To learn more about rates, go to the <a href="#">Contribution Rates</a> webpage.  For in-depth information about how rates are calculated, read <a href="#">Guide to Understanding Your Rate</a> .

# Statement sections

## Tab 2: Employer Statement

Your remittance statement (aka employer statement)

- This is your twice-monthly bill.
- Contains invoices generated during current statement period.
- Separated into three (or four) sections (because these are separate accounts):
- 1. Individual Account Program (IAP).
  - 2. Pension.
  - 3. RHIA.
  - 4. RHIPA (if applicable; this is the possible fourth section).

REMITTANCE STATEMENT					 Tell Me More
Current Contribution Rates	Employer Statement	Unbilled Activity	Employer Statement History	Wage and Contribution Report History	
THIS STATEMENT AT A GLANCE					
Employer	06000 - COASTAL FIRE DISTRICT				
Statement Period	12/21/2022 - 01/05/2023				
Remittance Due Date	01/12/2023				
Type	Previous Balance	Current Period Activity	Ending Balance	Amount Due	
IAP	\$56,100.59	\$1,507,089.02	\$1,563,189.61	\$1,563,189.61	
Pension	\$157,697.78	\$4,105,319.60	\$4,263,017.38	\$4,263,017.38	
RHIA	\$263.46	\$3,994.55	\$4,258.01	\$4,258.01	
Total Amount Due				\$5,830,465.00	



# Statement sections

## Tab 2: Employer Statement

This statement at a glance

This section shows the subtotal for each section of your statement. It includes the previous balance from your last statement, current activity (deposits and invoices) since the last statement, current ending balance, and the amount due.

THIS STATEMENT AT A GLANCE				
Employer	06000 - COASTAL FIRE DISTRICT			
Statement Period	12/21/2022 - 01/05/2023			
Remittance Due Date	01/12/2023			
Type	Previous Balance	Current Period Activity	Ending Balance	Amount Due
IAP	\$56,100.59	\$1,507,089.02	\$1,563,189.61	\$1,563,189.61
Pension	\$157,697.78	\$4,105,319.60	\$4,263,017.38	\$4,263,017.38
RHIA	\$263.46	\$3,994.55	\$4,258.01	\$4,258.01
Total Amount Due				\$5,830,465.00

Because each type of invoice is a separate fund, a credit in one account cannot be applied to another. For example, a Pension fund credit cannot be applied to the balance due on your IAP or RHIA.

Total amount due across all sections is calculated and provided at the bottom. This is the amount you will pay within five business days through Automated Clearing House (ACH) which is referred to as the PULL/Debit method or the PUSH/credit method.

If an ending balance is a credit, shown by parentheses, the amount due is \$0.



# Statement sections

## Tab 2: Employer Statement

About each section (fund)

	Type	Previous Balance	Current Period Activity	Ending Balance	Amount Due
A	IAP	\$56,100.59	\$1,507,089.02	\$1,563,189.61	\$1,563,189.61
B	Pension	\$157,697.78	\$4,105,319.60	\$4,263,017.38	\$4,263,017.38
C	RHIA	\$263.46	\$3,994.55	\$4,258.01	\$4,258.01
Total Amount Due					\$5,830,465.00

A	<b>IAP:</b> Includes 6% IAP contributions, voluntary contributions for active members.
B	<b>Pension:</b> Includes normal cost and UAL for active and retired members, plus side account credits, if applicable.
C	<b>RHIA/RHIPA:</b> Includes normal cost (PERS only) for active and retired members and a RHIPA UAL rate for state agencies and judiciary.

# Voluntary contributions

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How they came about

What they are for and who qualifies for them

How to know which employees participate

How to reconcile

# Voluntary contributions

## How they came about

### About the Member Redirect program

Introduced by Senate Bill 1049 (2019) in 2020 to help **control rising employer costs**.

A PERS member who earns over a certain amount per month has a portion of their 6%-of-salary IAP contribution redirected into an account called an **Employee Pension Stability Account** (EPSA). The funds in the account will help pay for the member's pension at retirement.

#### Redirected amount

Tier One and Tier Two members: **2.5%** of subject salary.

OPSRP members: **0.75%** of subject salary.

The program will continue until PERS is 90% funded.

#### 2025 salary threshold

**\$3,777** gross per month.

This amount is updated every January and listed on the [employers' Member Redirect webpage](#).

# Voluntary contributions

## What they are and who qualifies for them

### About voluntary contributions

Member redirect happens automatically in our system. No action required by employers unless employee opts into voluntary contributions.

**Voluntary contributions:** The option to make up the amount no longer being deposited into their IAP account. The contributions are:

- Employee paid.
- Equal to their redirect (no more, no less).
- Charged to you on your invoice and deposited into employee's IAP account.

VC must equal their redirect:

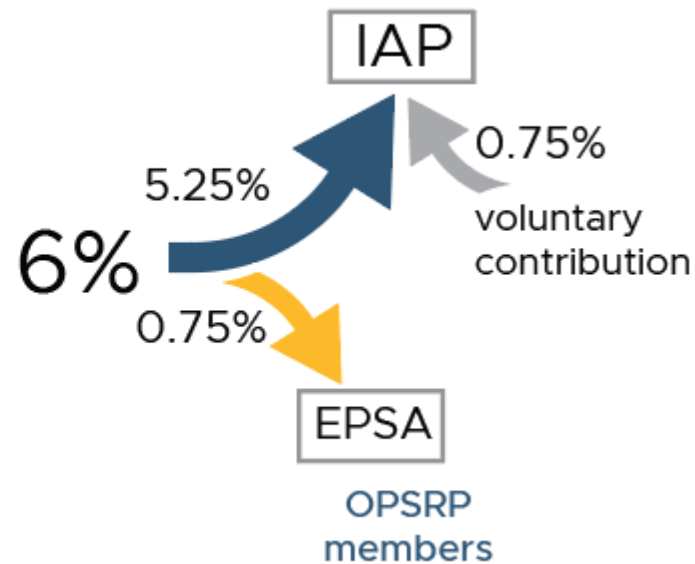
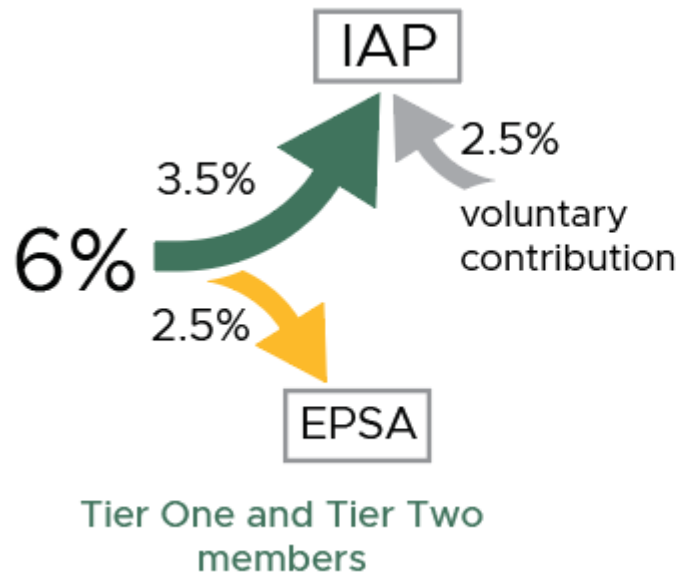
- Tier One/Tier Two: 2.5%.
- OPSRP: 0.75%.

During payroll, you deduct that amount from employee's pay (after-tax) to reimburse your account for the voluntary contribution charges on your invoice.

# Voluntary contributions

## What they are and who qualifies for them

Member redirect and voluntary contribution process



### Employees

- Opt into voluntary contributions through **Online Member Services (OMS)**.
- Stop voluntary contributions through OMS.

### Employer

- Notified of employee's choice to start/stop voluntary contributions by **Work List item**.

# Voluntary contributions

## How to know which employees participate

You can find out which employees participate by:

1. Running an IAP Voluntary Contribution report (next slide).
2. Receiving a Work list item when someone signs up (slide after next).
3. Contacting ESC for a status check on a new employee.

Remember, to make a VC, employees must:

1. Elect to participate in the program.
2. Meet the salary threshold each month.

# Voluntary contributions

## How to know which employees participate

IAP Voluntary  
Contribution report

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

Employer Number:

VIEW IAP VOLUNTARY CONTRIBUTION REPORT

Tell Me More

This report lists all employees who have IAP Voluntary Contribution Election(s).

Filter your report by year

2025

Enter a year (YYYY)

IAP Voluntary Contribution Report

Download CSV File

TELL ME MORE

This report is for informational purposes only and provides a list of employees who have elected IAP Voluntary Contributions during the specified year.

The specified year can only be one year later than the current year (2020 is the earliest year allowed).

The "Download CSV File" button will download the following information into a .csv file: SSN, PERS ID, Last Name, First Name, Effective Date, Stop Date, Plan and Percentage Rate by Plan.

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# Voluntary IAP contributions:

## How to know which employees participate

IAP  
Voluntary  
Contribution  
Work List  
item

WORK LIST

Tell Me More

Below is a list of employees for which PERS is requesting Information. The Work Item Type indicates the type of information that is required. Please complete and return each Work Item. Click on the SSN to enter salary information.

Create Demographic Correction Request (DCR).

Click on the leftmost column to get the detail of the clicked record.

Prev

1

2

Next

SSN	PERS ID	Last Name	First Name	Plan	Year	Request Date	Work Item Type	Status
			ELIZABETH	OPSRPDB		05/22/2025	Demographic Correction Request	Returned
			MITCHELL	OPSRPDB		08/22/2024	Demographic Correction Request	Returned
			KAREN	PERS-Tier 2		06/13/2025	Employer Data Verification Request	New
			James	PERS-Tier 2		06/13/2025	Employer Data Verification Request	New
			DAVID	OPSRPDB		06/02/2025	IAP Voluntary Contribution	New
			SHANNON	OPSRPDB		06/02/2025	IAP Voluntary Contribution	New
			PRECILA	OPSRPDB		05/30/2025	IAP Voluntary Contribution	New

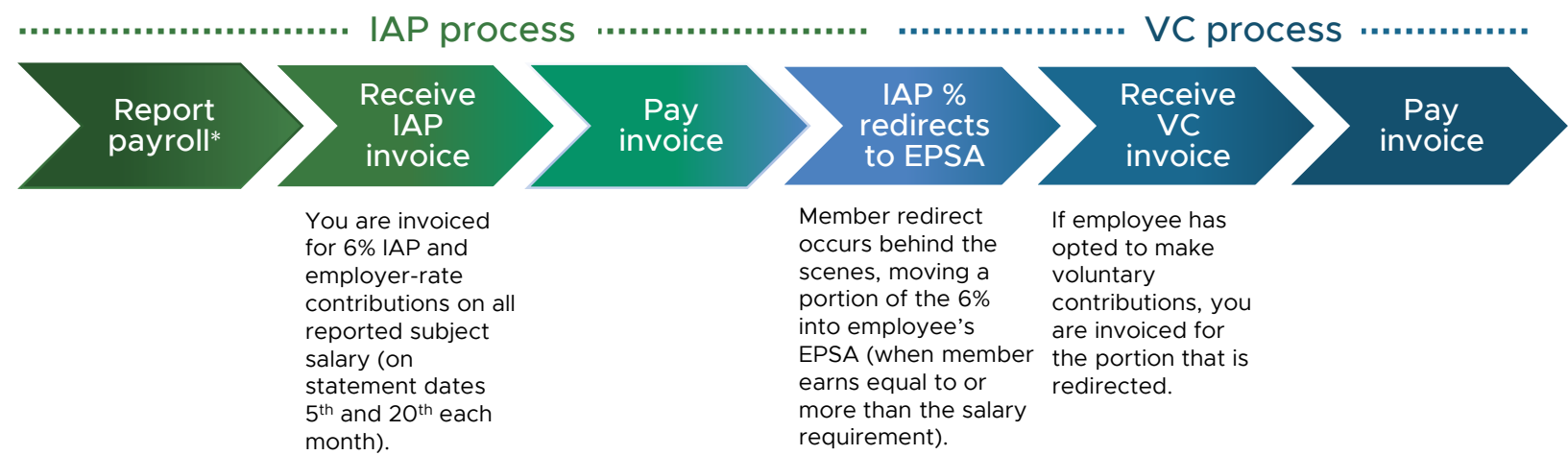
# Voluntary IAP contributions

## How to reconcile

How it affects your billing

Billing takes place over two statement periods because the 6% IAP must be paid first.

Process overview:



\*You need to deduct the member-paid after tax (MPAT) voluntary contribution amount from employee's paycheck when you do payroll.

# Voluntary IAP contributions

## Concurrent employment

**IF** an OPSRP member employee ...

- ✓ Has concurrent employment or multiple employers

+

- ✓ Meets the salary requirement.

+

- ✓ Participates in voluntary contributions.

**THEN** both employers ...

- ✓ Are invoiced the 0.75% (OPSRP) after-tax member redirect amount.

+

- ✓ Need to deduct the 0.75% from the employee's payroll.

### Example

Employer A paid the member \$2,500.00 in June.	}	\$5,500.00 subject salary
Employer B paid the member \$3,000.00 in June.		
Employer A pays 0.75% of \$2,500.00 (\$18.75)		
Employer B pays 0.75% of \$3,000.00 (\$22.50)		

# Voluntary IAP contributions

## Recap

We have discussed —

- How to **reconcile** voluntary contributions.  
Slides 24 and 25.
- Why we only see voluntary contributions on **some employees**.  
Because they must (1) meet the minimum salary, (2) be in a qualifying position, and (3) elect participation.
- How to report with **concurrent employment** /multiple employers.  
Slide 25.
- How to know which employees are **participating**.  
You will know by (1) receiving a Work List item when someone signs up, (2) running an IAP Voluntary Contribution Report, and (3) by contacting ESC for a status check.
- When the funds are **deducted** from the employee's pay.  
After taxes.

# Webinar weblinks

## List of links

<a href="#">EDX login page</a>	<a href="https://orion.pers.state.or.us/SelfServiceEDX/viewPage?component=/loginForm.jsp">https://orion.pers.state.or.us/SelfServiceEDX/viewPage?component=/loginForm.jsp</a>
<a href="#">Open an Employer Reporting Account</a>	<a href="https://orion.pers.state.or.us/SelfServiceEDX/SSSAEmprPaySpec.action?event=displayCreate&amp;mode=EMPR">https://orion.pers.state.or.us/SelfServiceEDX/SSSAEmprPaySpec.action?event=displayCreate&amp;mode=EMPR</a>
<a href="#">Employer guide 3, <i>Reporter Roles and EDX Access</i></a>	<a href="https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Employer-Guide_Ch3_Roles-and-EDX-Access.pdf">https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Employer-Guide_Ch3_Roles-and-EDX-Access.pdf</a>
<a href="#">Employer guide 26, <i>Understanding Your Statement</i></a>	<a href="https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Guide-26-Understanding-Statement.pdf">https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Guide-26-Understanding-Statement.pdf</a>
<a href="#">Guide to Understanding Your Rate</a>	<a href="https://www.oregon.gov/pers/emp/Documents/UALRP-Guides/understanding-your-rate.pdf">https://www.oregon.gov/pers/emp/Documents/UALRP-Guides/understanding-your-rate.pdf</a>
<a href="#">Glossary guide</a>	<a href="https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Employer-Guide-Quick-Ref_Glossary.pdf">https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Employer-Guide-Quick-Ref_Glossary.pdf</a>
<a href="#">Contribution Rates webpage</a>	<a href="https://www.oregon.gov/pers/EMP/Pages/Contribution-Rates.aspx">https://www.oregon.gov/pers/EMP/Pages/Contribution-Rates.aspx</a>
<a href="#">Employers' Member Redirect webpage</a>	<a href="https://www.oregon.gov/pers/emp/Pages/Member-redirect.aspx">https://www.oregon.gov/pers/emp/Pages/Member-redirect.aspx</a>

# Questions and answers (Q&A)

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# 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.

All questions and answers will be transcribed, reviewed by our policy experts, and published under Webinars on the [Training webpage](#).

**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**

[Employer Service Center  
contact information](#)

