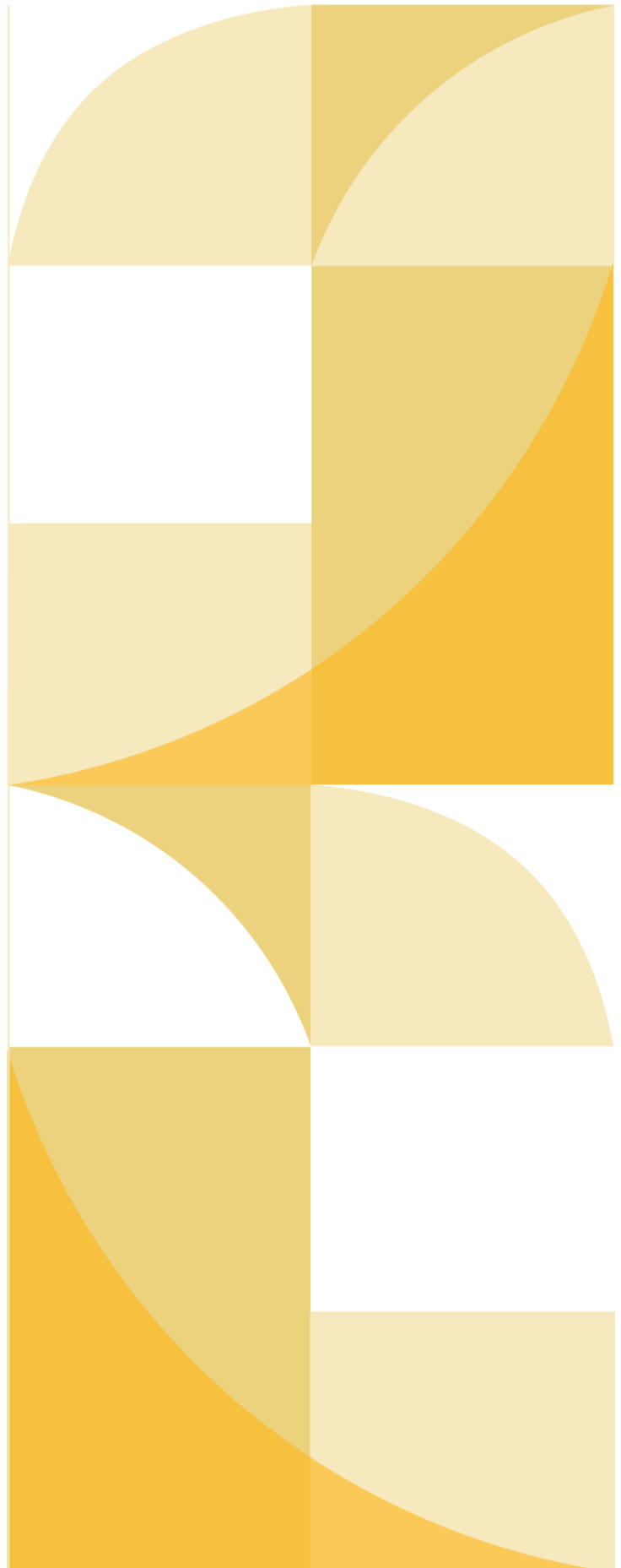# OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Beginner Employer Reporting 1
Introduction & Overview

ESC Training Manual

Overview of PERS, the employer reporter role, and how to create reports and records in EDX.

Employer Service Center

Contents

September 2025

Overview of PERS

Introduction

The Oregon Public Employees Retirement System (PERS) provides a pension for most of Oregon's public-service and state employees. This means that employees who work for an Oregon local government, school, or state PERS-participating employer long enough to earn a PERS pension will receive **monthly income for the rest of their lives** when they retire.

Once an employee is **vested**, their pension is guaranteed (unless the employee withdraws from membership). Some retirees also have the option of having a **beneficiary** receive a portion of their pension when they die (in exchange for a smaller pension payment during retirement).

The PERS system is **managed** by multiple government organizations who ensure that the system is financially healthy, affordable, and compliant with Oregon law. This requires adjustments to the PERS system every few years. In fact, since PERS was created in 1946, it's undergone about 100 **legislative changes**.

The Oregon Public Employees Retirement Fund (OPERF) is the trust fund for PERS and is :
- Funded by earnings on investments, contributions from participating employers, and contributions from active members.
- Managed by the Oregon State Treasury.
- Invested by the Oregon Investment Council.

The PERS rules and benefits are:
- Set by the Oregon Legislature.
- Managed by the PERS Board.
- Administered by the PERS agency.

About 900 state government, public schools, community colleges, and local governments (i.e., cities, counties, and special districts) **participate in PERS**, which covers about 95% of all public employees in Oregon — more than 415,000 people.

PERS is a system and an agency

PERS, the system, is the pension plan and trust. This is the money side of PERS. Money goes into the PERS Trust to fund the retirement payments. The plan is governed by laws that guide how those funds are invested and disbursed.

PERS, the agency, is the organization that collects the contributions and pays the retirees. This is the people side of PERS. The employees of the agency administer the system in accordance with the laws set by the Oregon Legislature. The PERS agency collects money to fund the trust by invoicing employers and sends the checks (or automatic payments) to retirees.

PERS retirement by the numbers

The PERS retirement package provides two main benefits: a pension and an extra investment account called an Individual Account Program (IAP) account. The pension provides monthly payments for life, and the IAP provides disbursements until it is paid out.

3 Three primary benefits

Pension

Type of benefit: 401(a) defined-benefit plan.

Provides: Monthly payments for life that can equal up to about 45% of what the retiree earned while working, if they earn benefits for at least 25 to 30 years.

Funded by: Your organization's bimonthly payments to PERS, which are calculated as a percentage of your payroll. The percentage is called your "contribution rate," which is based on numerous factors and varies by employer.

Beneficiary option: The retiree can choose to have a portion of their pension paid to a beneficiary when they die. This option gives the retiree a smaller pension payment.

Divorce: A retiree's former spouse may have a right to a portion of their pension. In addition to legal fees, the retiree pays administrative fees to PERS to cover the cost to set up their former spouse's account.

Individual Account Program (IAP)

Type of benefit: Internal Revenue Code 414(k) account.

Provides: An account that can be disbursed in monthly payments or taken as a lump sum to roll over or reinvest.

Funded by: Monthly contributions of 6% of gross salary paid by the employee or employer to PERS, deposited into the employee's IAP account.[1]

Beneficiary option: If a retired member dies before all installment payments are completed, their beneficiary will receive the remaining amount in a lump-sum payment.

Divorce: A percentage or flat dollar amount of the IAP can be awarded to a former spouse.

Oregon Savings Growth Plan (OSGP)

Type of benefit: A 457(b) deferred-compensation plan available to public employees whose employers participate in OSGP.

Provides: Another way to save for retirement through automatic paycheck deduction.

Funded by: The employee. Employee can choose to save a percentage of salary or a dollar amount by either a pretax or after-tax (Roth) contribution.

Beneficiary option: The member may designate multiple beneficiaries.

Divorce: A member's former spouse may have a right to a portion of their OSGP.

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[1] Effective July 1, 2020, a portion of this 6% is redirected to fund an Employee Pension Stability Account (EPSA) when the qualifying member earns over a certain amount in a month. The EPSA is used to help fund the employee's pension benefit. Members have the option to make additional after-tax contributions to their IAP to make up the funds being redirected to their EPSA.

Other benefits

Retiree health insurance: Retirees can purchase health insurance through the PERS Health Insurance Program (PHIP). For eligible members, employer-funded accounts (i.e., Retiree Health Insurance Account (RHIA) and Retiree Health Insurance Premium Account (RHIPA)) may provide a subsidy toward the monthly premiums.

Member disability benefits: A non-retired employee who becomes too sick or injured to work may be eligible to receive disability benefits. The Tier One and Tier Two disability is considered early retirement, and the amount is calculated as such. The OPSRP disability is considered a disability benefit and is a monthly payment of 45% of their previous salary.

3 Three pension programs

The Oregon legislature sets PERS policy, including benefit levels, membership requirements, and retirement options by adopting bills that are codified in statute as laws. Nearly every legislative session, the Oregon Legislature considers bills attempting to modify the PERS retirement system. The Legislature also introduces bills intended to ease employer contribution rates.

Twice since PERS began, the Legislature has added a new program to the plan. Today, PERS has three programs: Tier One, Tier Two, and the Oregon Public Service Retirement Plan, or OPSRP.

Tier One   1946 to December 31, 1995

Public employees who began working for a PERS-participating employer and established membership on or before December 31, 1995, are members of Tier One. When Tier One employees retire, they are eligible to receive a lifetime pension, and the money in their IAP account[2]. No matter how the market is performing, Tier One employees earn a guaranteed return on the funds in their Tier One regular member account. They also qualify to retire at a younger age than Tier Two.

A Tier One General Service member[3] with less than 30 years of service time can retire at 58 years old with a pension, an IAP account, their OSGP account (if they have one), and other accounts that preceded the IAP, if they have them.

Tier Two   January 1, 1996, to August 28, 2003

The Oregon Legislature reformed PERS in 1995 and created Tier Two. When Two Tier members retire, they are eligible to receive a lifetime pension and the money in their IAP account[2]; however, unlike Tier One members who receive a guaranteed rate of return, Tier Two regular account balances earn actual market returns.

Other than that difference, the benefits of Tier One and Tier Two are fairly similar. This is why PERS charges you the same, higher rate for your Tier One and Tier Two members and a different, lower rate for your OPSRP members.

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[2] Prior to the creation of the IAP, Tier One and Tier Two members were required to contribute 6% of their salary into member accounts that helped fund their pension benefit. Beginning January 1, 2004, members of all three programs began contributing 6% of their salary into new Individual Account Program (IAP) employee accounts with earnings and losses based on market performance. Tier One and Tier Two members retained their existing Tier One and Tier Two member accounts, but those accounts would not receive any additional employee contributions.

[3] General Service is a PERS classification for a job that is not identified as a judge, police officer, firefighter, school employee, legislative, or elected- or appointed-official position. This is covered in section "Eight Job Classifications."

A Tier Two General Service member with less than 30 years of service time can retire at 60 with a pension, an IAP account, their OSGP account, if they have one, and other accounts that are no longer offered, if they have them.

Oregon Public Service Retirement Plan (OPSRP)   August 29, 2003, to today

In 2003, PERS was reformed again, resulting in a third program — the Oregon Public Service Retirement Plan (OPSRP) — and the Individual Account Program (IAP). OPSRP was designed to cut employer rates while still providing an excellent retirement program.

An OPSRP General Service member with less than 30 years of service time can retire at 65 with a pension, an IAP account, and their OSGP account, if they have one.

Eight job classifications

All employees are assigned one of eight job classifications when they start a new job. The six most common job classes are overviewed below. For details of what jobs qualify for each job class, refer to the *Job Classification Codes* quick-reference guide.

For information on the special rules and benefits of job classifications 02 through 09 (listed below), read appendix A of employer guide 1, *Overview of PERS*.

01 General Service

Encompasses all positions that do not fall into one of the other seven job classes.

02 Police and Fire

Includes corrections officers, parole and probation officers, state police, local police, firefighter, and public employees of cities, counties, or districts who meet the definitions of police officer or firefighter in the *Job Classification Codes* quick-reference guide.

05 Judge Member

Judges who serve in the Oregon judicial system.

06 Legislator

Legislators elected by the people to the Oregon State Senate or House of Representatives.

08 Elected Official

Officials appointed to an office with a fixed term, elected officials, and Governor-appointed agency directors.

09 School Employee

Teachers, school leadership, and school support staff (refer to the *Job Classification Codes* quick-reference guide for more detail).

Other job classes

The other, rarely assigned job classes are 04 Teachers Insurance and Annuity Association/College Retirement Equities Fund (TIAA/CREF) and 07 Teachers Retirement Fund Association (TRFA).

3 Three sources of funding

In order of the amount of their contribution to the PERS Fund, the funding sources for the system are:

1 **Investment earnings** — interest and returns earned by the PERS Fund. This is by far the largest source of income to the PERS Fund. The fund is managed by the Oregon Treasury under the direction of the Oregon Investment Council.

2 **Employer contributions** — calculated based on the aggregate salary information you report multiplied by your contribution rate, plus other factors.

3 **Member contributions** — includes the Tier One and Tier Two pre-IAP individual accounts and the 6%-of-salary Individual Account Program (IAP) contributions[4]. IAP contributions can be paid by the employee or through an employer "pick-up."

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[4] A portion of this 6% may be redirected to fund the member's Employee Pension Stability Account (EPSA).

The employer reporter role

Employer reporters play a vital role for PERS members.

They are the link between the members and PERS. By submitting employee information to PERS accurately and timely, employer reporters ensure that employees receive all the retirement benefits that they've earned over a career serving Oregon citizens.

Reporting data

Employers enter information about their employees into a web-based tool called Employer Data Exchange (EDX), which is available through the PERS employer website. The types of employee information employers provide include:

- **Demographic information** such as name, address, date of birth, Social Security number.
- **Employment status** such as new hire, termination, leave of absence.
- **Wage and service information** including regular pay, hours worked, overtime hours and pay, and special payments.

Reporter roles

Every PERS-participating employer has two roles: a web administrator and an employer reporter. Only people registered in these roles can access the data in EDX. For detailed information about the roles and what they do, read employer reporting guide 3, *Reporter Roles and EDX Access*.

Web administrator

Every employer has a web administrator who manages access to your employer account in EDX. Their responsibilities include resetting passwords, unlocking accounts, and managing the Contacts List.

Establishing a web administrator account

1   Prospective web administrator fills out the Web Administrator Agreement form. (For help, read Web Administrator Agreement form instructions.)

2   Prospective web administrator and organization reporting official (i.e., a staff member authorized to make administrative or financial decisions) sign the form.

3   Prospective web admin mails or emails the signed form to PERS (go to Contact Us).

4   PERS sets up web admin login and temporary password.

Activating an employer reporter account

For instructions, go to employer guide 3, *Reporter Roles and EDX Access,* "Part 1 — The Web Administrator," Managing EDX Access," Managing Employer Reporter Accounts," subsection "How to Activate an Employer Reporter Account."

IMPORTANT	The web administrator does not initiate the process of creating a new employer reporter account — the employer reporter must do that.
	Adding an employer reporter to your list using the Work with Contacts function only adds them to a contact list — it does not give them EDX access. The only way a new reporter can get EDX access is to create an account themselves, which you then activate.

Employer reporter

Each organization can have up to 15 employer reporter accounts. The employer reporter enters employee wages, hours worked, demographic information, work status, job type, and more in EDX.

A new employer reporter sets up their own user account in EDX. The web administrator then activates the account.

Establishing an employer reporting account

1. On the EDX login page, click Open an Employer Reporting Account.
2. Fill in your account information and click Save Account.
3. Notify your web administrator that you have submitted a request to open an account.
4. The web administrator activates your account and notifies you.

? **Tell Me More**

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

Are you a Web Administrator?

You are a Web administrator if you already have a user ID and password sent to you from PERS. You may log in and start work now.

If you have questions, Contact Us. We will be happy to help you.

Getting started in EDX

Logging in

1. Go to the EDX Log In page.

2. Enter your user ID and password and click Log In. (Employer reporting guide 3, *Employer Roles and EDX Access*, provides format guidelines for your EDX user ID and password. Go to "Part 1 — Web Administrator," "Getting Started" or Part 2 — The Employer Reporter," "Getting Started.")

PERS LOG IN

Enter your User ID and Password below.

User ID

Password

→] Log In

Choosing your employer

The name of the currently selected employer is displayed at the top of the Employer homepage. If you report for more than one employer, you will have a Switch Employer pull-down menu that you can click to select a different employer. You can select the employer that opens each time you log in by clicking the "Set as Default" button.

CC **COMMUNITY COLLEGE**
Employer Number:

˅˄ Show less   ☆ Set as Default   Switch Employer ˅

Address   Status   Active
                     Status Date   07/01/1946
Phone   Reporting Frequency   Monthly

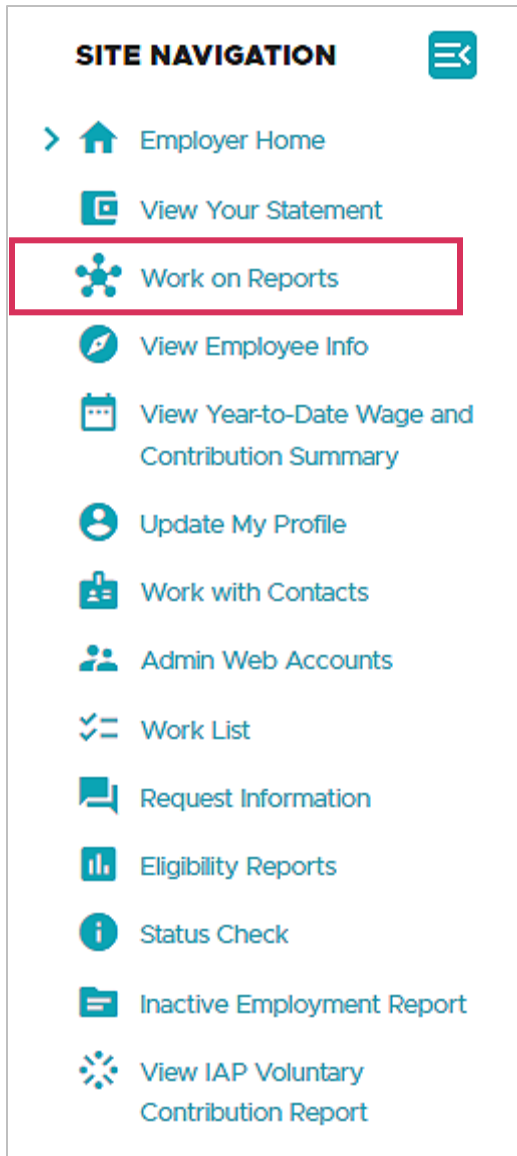**EMPLOYER HOME PAGE**   ❓ Tell Me More

ALERTS FROM PERS

You have no alerts.

Choosing a function

Choose what you want to do from the Site Navigation menu on the left.

In this training, we will review the **Work on Reports** function. The other functions are covered in additional trainings and the employer reporting guides.

Working on reports

The reporting process

The flow chart below illustrates the process of creating a report, populating it with records, and releasing the report. If EDX finds no errors in the records during its overnight validation process, it posts the report. EDX calculates the contributions you owe (and credits you will receive) for that pay period based on what you reported.

If EDX finds errors or possible errors in a record, it "suspends" the report. You must correct the errors in the records and save them. EDX will validate the records again overnight and, if they are correct, it will post the report. If they are not correct, the process repeats.
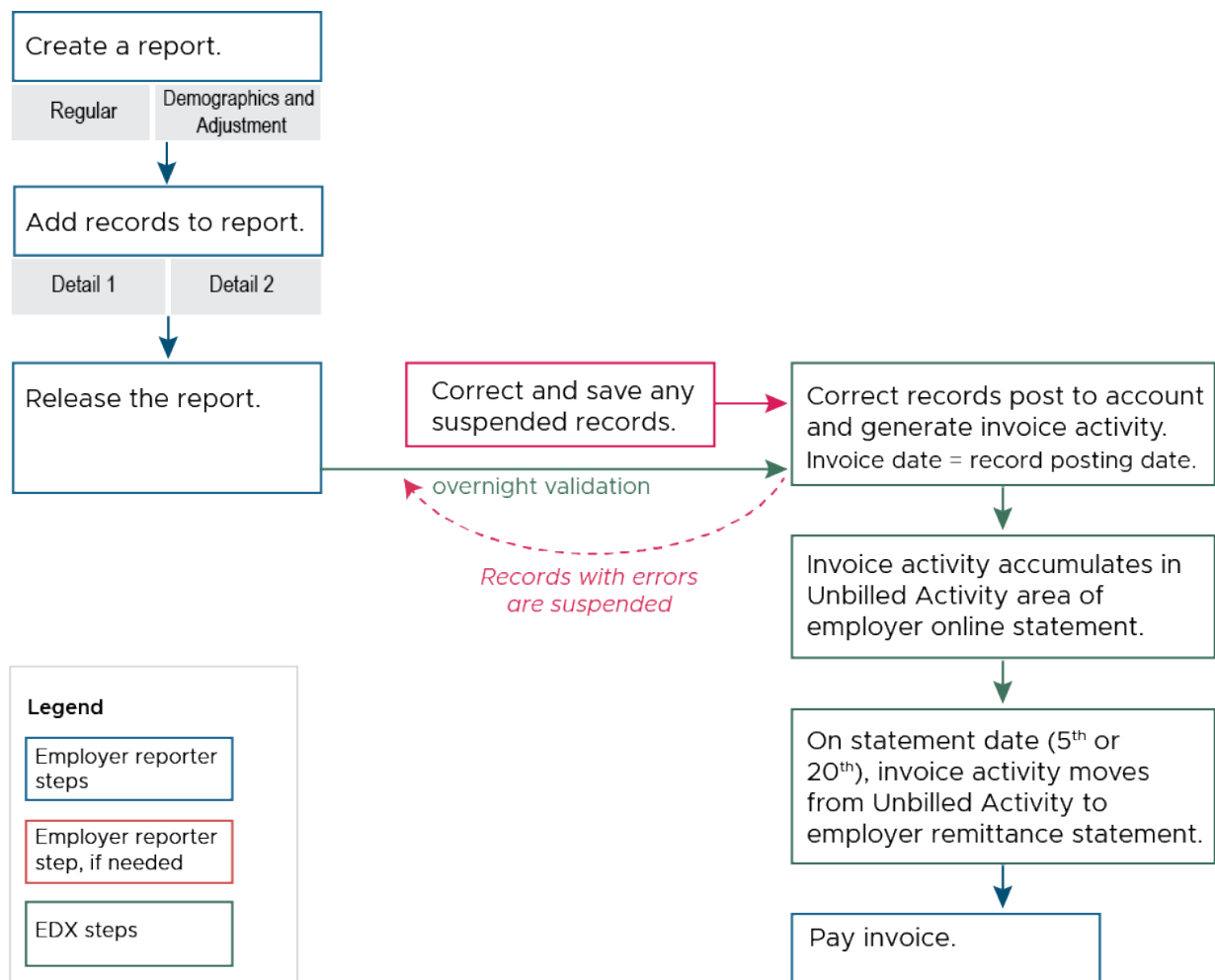
Report types

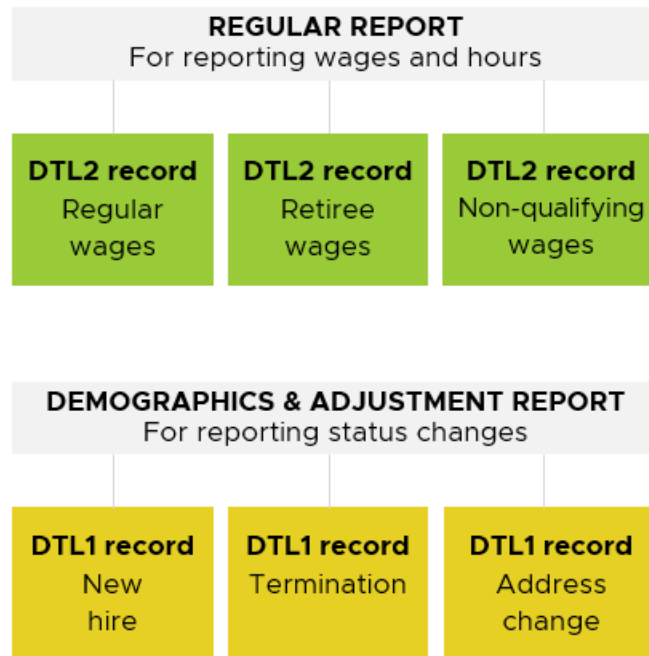There are two types of reports you will need to create in EDX: **Regular reports** and **Demographics and Adjustment reports**.

The image below shows an example of the types of records that might be included in each type of report.

REGULAR REPORT
For reporting wages and hours

DTL2 record	DTL2 record	DTL2 record
Regular wages	Retiree wages	Non-qualifying wages

DEMOGRAPHICS & ADJUSTMENT REPORT
For reporting status changes

DTL1 record	DTL1 record	DTL1 record
New hire	Termination	Address change

Regular report

Regular reports are reserved for submitting your normal payroll on assigned dates. Each report contains Detail 2 records with wage, hour, and contribution information (if applicable) from every pay date between the last Regular report and the next Regular report.

Rules and guidelines for Regular reports

- Submitted on specific dates assigned to most closely match your pay date schedule:*

    1. Monthly: Last day of the month.

    2. Semi-monthly: 15th and last day of the month.

    3. Bi-weekly: Every other Friday.

    4. Weekly: Every Friday.

- All Detail 1 status codes (Appendix B) and all Detail 2 wage codes (Appendix A) are permitted.

- You have a three-business-day "grace period" after the assigned report date to release the report and still be considered on time.

*Report due dates for each schedule are listed on the Employer EDX Regular Report Dates webpage.

Example: A semi-monthly reporter schedule

Regular pay date: 5th Supplemental pay date: 9th Supplemental pay date: 12th	Report due on 15th of the month
Regular pay date: 16th Supplemental pay date: 20th Supplemental pay date: 26th	Report due on last day of the month

Demographics and Adjustment report

A Demographics and Adjustment report may contain:

- Detail 1 records with employee demographic or status changes.

- Detail 2 wage records that are being corrected or were missed from a previous Regular report.

These reports inform PERS who your employees are, what their employment status is, and if they qualify for membership. All employees need to be reported; however, you only owe pension contributions and report 6% IAP contributions for employees in qualifying positions.

Rules and guidelines for Demographics and Adjustment reports

- Submitted on any date **except** your Regular report date.

- All Detail 1 status codes can be used.

- All Detail 2 wage codes can be used except:

  - 01 Regular Wages

  - 07 Retired/No Contributions (i.e., working retiree wages).

  - 08 Contributions/No Service (i.e., when employee is being paid but not working).

  - 11 USERRA Qualifying Wages (wages a military employee would have received had they not served on military duty).

- It's best to include **all Detail 1 records** only in Demographics and Adjustment reports. You can submit Detail 1 records in Regular reports, but if there is a problem with a Detail 1 record, it can delay the Detail 2 salary records that are in the same report.

Creating a report

1. To begin working on reports, select **Work on Reports** in the Site Navigation menu.

The Work on Wage and Contribution Reports page appears. On this page is a list of all your posted and un-posted Regular and Demographics and Adjustment reports.

2. Click the **Create a New Report** link to begin a new report.

3. On the Report Creation Form, enter/choose the following three items and then click Next:

   ▪ Enter a report date.
   ▪ Choose a report type.
   ▪ Choose how you would like to add records to the report before clicking Next.

Populating a report

Please choose a method for populating your report.

EDX provides three options for adding records to your new report.

Option 1: Upload a payroll file

If your organization uses third-party software for financial reporting, it may have been modified to create a ".dat" file for PERS reporting.

To use the file upload method to add records to a report, select the first option and then click **Next**. Click **Choose File** and navigate to the dat file that you want to upload to EDX.

Click **Begin Upload**.

UPLOAD FILE

Upload the file for the new wage and contribution report with the following **Report Date: 11/09/2022**

- This file should contain all the wage and contribution data for the new wage and contribution report.
- The format of the file should comply with the standards set by PERS.
- To move the file from your computer or system to ours, click on the 'Choose File' button. Then choose the file from your directory.

File   Choose File   No file chosen

Begin Upload

Dat file format

A dat file is made up of rows of 450 characters. Every record has a header row, the Detail 1 or Detail 2 record data, and a footer row. Each data field has a specific allotment of characters that must be filled with numerals, characters, or filler characters.

Your file must adhere to the required format exactly or it will not upload.

Follow the format requirements outlined in the *EDX File Format and Development Guide* to ensure success.

Option 2: Copy member records from most current posted report

This method will "copy forward" all the records from your last 100% posted Regular report and allow you to enter the pay date for the records in the new report.

Notes: You can only use this method to report up to **249** employees.

You can only copy forward **Regular reports** because wage records tend to have similar information from one pay period to the next. Demographic and Adjustment reports are too variable.

When you choose this option, the Pay Date field appears. This allows you to enter the new pay date to apply to the records being copied forward. If the salary and hours are different from the previously posted report, additional edits will be needed.

Please choose a method for populating your report.

○ I would like to upload a payroll file to populate this report.

◉ I would like to copy member records from the most current posted report to this report.

Pay Date

Enter a date (MM/DD/YYYY).

○ I would like to create an empty report and add member records manually.

Next

Option 3: Add records manually

With this method, you can create a blank report and add records one at a time. This is a good option for creating a unique report for one employee.

After entering the date and report type, select the third option for populating your report and click Next. (Remember that a Regular report *must have* a preassigned Regular report date. A Demographics and Adjustment report *cannot have* a preassigned Regular report date).

CREATE A NEW REPORT

If you wish to create a new Wage and Contribution Report, enter the correct report date and choose a method for populating your report.

Report Date   11/08/2022

Enter a date (MM/DD/YYYY).

Report Type   Regular

Please choose a method for populating your report.

○ I would like to upload a payroll file to populate this report.

○ I would like to copy member records from the most current posted report to this report.

◉ I would like to create an empty report and add member records manually.

[Next]

When you create your new report, the Create Retirement Detail Report Confirmation screen appears. Select "Return to Report Summary Page" to return to the Work on Wage and Contribution Reports page.

CREATE RETIREMENT DETAIL REPORT CONFIRMATION

The wage and contribution report has been successfully created for the following :

Report Date   11/08/2022

What Next?

You may continue to work with the web site if you desire. Click on any link below to visit other areas of the web site.

Â Â Â Â View Information about your Agency
Â Â Â Â View your Agency Statement
Â Â Â Â View the Current Employee List for your Agency
Â Â Â Â Return to Report Summary Page

Creating a record

Instructions

1. Locate your new report under Unposted Regular Reports or Unposted Demographics and Adjustment Reports. It will have a status of "Added" and the date you entered. Click "edit" to create a record to add to the report.

UNPOSTED REGULAR REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Suspended	01/31/2020	01/31/2020	delete	edit	n/a	View Report	View Details	n/a
Suspended	12/31/2019	12/31/2019	delete	edit	n/a	View Report	View Details	n/a
Suspended	01/31/2019	01/31/2019	delete	edit	n/a	View Report	View Details	n/a
Added	11/09/2022	11/08/2022	delete	edit	n/a	View Report	View Details	View Totals

2. On the Edit Retirement Detail Reports screen, enter the Social Security number of the employee for whom you need to add a record and click **Add or Edit Record**.

EDIT RETIREMENT DETAIL REPORTS ❓ Tell Me More

You may view, add, or edit any unposted records on the current report.

OPTION 1 - FINISHED EDITING THIS REPORT?

Finished Editing This Report? Click the **Done** button to return to the Work on Retirement Detail Reports page. You may re-edit this report at any time in the future until all records on the report are posted.

[Done]

OPTION 2 - ADD OR EDIT A RECORD

You may add a new record or edit an existing record. Enter a Social Security Number to view or edit a record for that employee. Or add a new record by entering the Social Security Number and completing the form that appears on the following page.

SSN [   ]

[Add or Edit Record]

OPTION 3 - UNPOSTED RECORDS

Click on a record to make changes to the record. The following page will provide you with a list of errors found during the last nightly validation batch run for each employee record in this list.

3. On the Add/Edit Member Records screen, choose the type of record you wish to add. Record types are covered in the next section.

ADD/EDIT MEMBER RECORDS

Working With SSN

Choose the type of record to create from the list below, then click Add New Record.

ADD NEW RECORD

- ◉ Detail 1 - Member Demographics.
- ○ Detail 2 - Wage and Service.

[Add New Record]

Click **OK** to return to the Edit Retirement Detail Reports page.

[OK]

Record types

Records are used to communicate employee and wage information. There are two types.

Detail 1 record communicates information about a **person**.

Detail 2 record communicates information about **wages**.

Detail 1 Member Demographics record

A Detail 1 record is not submitted with each report — only when something about the individual changes, such as their status with the employer or mailing address. Here is an image of a blank Detail 1 record. Note that the majority of the fields are for demographic information. The next section explains the fields, starting with Status Code.

ADD/EDIT A MEMBER RECORD

The status of this member record is: **Added**

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	
Status Code	00 - No Change in Status
Status Date	(MM/DD/YYYY)
Last Day Service	(MM/DD/YYYY)
Old SSN	
First Name	
Last Name	
Middle Name	
Name Change Indicator	N
Address - 1	
Address - 2	
Address - 3	

Continued

City	
State	NONE
Zip - 1	
Zip - 2	
Province	
Country Code	USA
Postal Code	
Date Of Birth	
	(MM/DD/YYYY)
Gender	
PERS Job Class Code	
Average Overtime Hours	
Unused Sick Leave Hours	
Contract No. of Months	00
Employer Site Distribution Code	
Non PERS Data Memo	

Save   Cancel

Detail 1 fields

Status Code

This field is required. It tells EDX what type of status change, if any, you are reporting for the employee. If you are reporting a demographic change, such as a new address, use code 00. If you are reporting a status change, such as a leave of absence, use one of the leave of absence status codes.

For a description of all status codes, refer to appendix B "Status Codes."

For a detailed explanation of different types of leave (status codes 03–09), read employer reporting guide 11, *Reporting a Leave.*

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	111223333
Status Code	00 - No Change in Status ⌄

- 00 - No Change in Status
- 01 - Qualifying New Hire
- 02 - Terminated
- 03 - On Family Leave
- 04 - On Career Development Leave
- 05 - On Military Leave
- 06 - On Legislator Leave
- 07 - On Leave of Absence
- 08 - Return from Leave
- 09 - Seasonal Leave of Absence
- 10 - Deceased
- 11 - Retiree New Hire with Hr Limit
- 12 - Retiree New Hire w/o Hr Limit
- 13 - New Hire - Retiree return to service
- 14 - Notice of Unit Election
- 15 - Non-Qualifying hire

Status Date

Last Day Service

Old SSN

First Name

Last Name

Status Date

The date on which the new status or demographic change begins (e.g., first day of leave, first day as a new employee, first day as a terminated former employee, first day back from leave without pay, first day as a retiree hire, or date of death).

Last Day Service

Only used when an employee is leaving a position. For a termination (e.g., retirement, job change) or death, last day of service is the employee's last day on the job or last day of paid time off, whichever is later.

If employee is not returning from a leave without pay, the last day of service is their last day on the job or last day of paid time off, whichever is later. The status date is the first day they are no longer your employee.

Old SSN

If you discover that your employee's Social Security number is incorrect, this field allows you to correct it. However, it is best to contact the Employer Service Center to have them correct this issue.

Having two Social Security numbers for one employee can lead to two separate accounts that need to be merged by the Employer Service Center. So, it is best to contact your ESC rep or submit a DCR for help.

First Name

Required.

Last Name

Required.

Name Change Indicator

Required. "N" is the default. Choose Y to change an employee's name in the record. If needed, you can change their address in the same record (e.g., an employee's name and address changes because of marriage).

Address – 1

Enter the address if you are reporting a new hire, a termination, or an address change. Use all capital letters. Include the apartment or unit number in this field. Make sure to fill out the city, state, and zip code fields.

Province

Use for foreign address when country code is not USA. Include the postal code.

Gender

This field is required when reporting a new hire. If your employee does not identify as male or female, follow these steps:

1. Choose Male or Female to get the record to post.
2. Create a Demographic Correction Request (DCR), as explained in employer reporting guide 20, *Creating a DCR*.
3. In the DCR Comments box, ask PERS to change the employee's gender to Non-Binary/Other.

Tips

- Status codes are listed in appendix B.

- ESC recommends that you submit all Detail 1 records in Demographics and Adjustment reports. You can submit Detail 1 records in Regular reports, but if there is a problem with a Detail 1 record, it can delay the Detail 2 salary records in the same report.

- Submit a new employee's Detail 1 new-hire record and let if post overnight before submitting any other records for that employee. When an employee's first Detail 2 wage record is submitted at the same time as or before the Detail 1 new hire record, the Detail 2 record will suspend with error message "S – the SSN entered is not found to have a record of open employment with this employer."

Detail 2 Wage and Service records

Detail 2 records are submitted with each Regular report to report normal monthly payroll. Each Detail 2 record includes an employee's wages, hours, and contributions (if applicable).

Note: A Detail 2 record can be created in a Demographic and Adjustment report when it is an adjustment record (i.e., you are reporting payroll that was missing or needed correcting).

Below is an image of a blank Detail 2 record. Notice that most of the fields are wage- and contribution-related. The next section describes how to fill in the fields (skipping the obvious ones like Hours Worked).

DETAIL 2 - WAGE AND SERVICE

SSN

First Name

Last Name

Pay Date
(MM/DD/YYYY)

Work Period Begin Date
(MM/DD/YYYY)

Work Period End Date
(MM/DD/YYYY)

Hours Worked (Regular)

Hours Worked (Overtime)

Reported Wage Code

Subject Salary (Regular)

Subject Salary (Overtime)

Non-Subject Salary

Lump Sum Payoff

Lump Sum Vacation Payoff

Continued

Gross Salary

Member Paid After-Tax Contribution (MPAT)

Member Paid Pre-Tax Contribution (MPPT)

Unit Contribution

Employer Paid Pre-Tax Contribution (EPPT)

Optional Employer IAP Percentage   0%

Optional Employer IAP Contribution

PERS Job Class Code

Average Overtime Hours

Employer Site Distribution Code

Non PERS Data Memo

Save   Cancel

Detail 2 fields

Pay Date

This is the date printed on the employee's paycheck. When you are manually adding records to a report, this field defaults to the report date, so you need to change it to the actual pay date for which you are reporting.

Work Period Begin Date and Work Period End Date

Important to know about these fields

- School employers must never use these fields.

- These fields are only used by local government employers to report salary for the period in which it was earned.

- This only applies to Tier Two and OPSRP employees, but local government reporters can also report Tier One employees this way for consistency.

- The pay period begin date and end date must be in the same month. If the pay period ends in the next month:
  - Put the last business day of the month as the pay period end date.
  - Create a new record with a pay period begin date of the first business day of the month.
  - The pay period end date is the actual pay period end date.

- Employers can use a single Detail 2 record with Work Period Begin/End Date and Pay Date fields filled in the following situations:
  - The pay period begin, pay period end, and pay date are in the same month.
  - The pay period begin and end are in one month and the pay date is in the next month.

  For an example, see the Example Scenarios & Exercises section, example 2 — Report wages for a local government employer.)

Reported Wage Code

The wage code tells EDX the type of pay you are reporting. Wage codes are listed in appendix A. The most-used codes are:

01 - Regular Wages	Used to report wages for active service (qualifying) positions.
02 - Regular/Non-qualifying	Used to report wages for non-qualifying service positions.
17 - Retired/No Contributions	This is the **only** code used to report wages for regular service retirees returning to work as retirees after 1/1/2020.

Salary

All salary paid to an employee in cash out of the funds of a public employer in return for services must be reported to PERS. On a Detail 2 record, salary is separated into subject salary (regular and overtime) and non-subject salary.

To determine if a payment is subject to contributions or not, check the Payment Categories Chart. The chart lists all types of payments that are considered subject salary for Tier One/Tier Two members (called Chapter 238) and OPSRP Pension Program members.

For help understanding when to report wages in the Non-Subject Salary field, refer to the *Correct Usage of Subject and Non-Subject Salary Fields* quick-reference guide.

Gross salary is the sum of all other salary entries on a Detail 2 record. EDX will not calculate gross salary, but it will check your calculation for accuracy.

MPAT, MPPT, and EPPT

The contribution method your organization uses to enter employees' 6% Individual Account Program (IAP) contributions is based on the notice of contribution type your organization provided to PERS in accordance with Oregon Administrative Rule (OAR) 459-009-0130. If you are not sure of your organization's contribution type, your ESC representative can look it up for you.

The three types are:

MPAT Member-Paid After Tax. The contribution is deducted from the employee's paycheck after taxes.

MPPT Member-Paid Pre-Tax. The contribution is deducted from the employee's paycheck before taxes.

EPPT Employer-Paid Pre-Tax. The contribution is paid by the employer on the member's behalf (often referred to as the "employer pickup").

Unit Contribution

This field is used only if you are reporting unit contributions for a Tier One/Tier Two Police and Fire job-classification employee who has elected to participate in the P&F Unit program.

About the P&F Unit program

The unit program provides income after retirement for Tier One/Tier Two Police and Fire members who participate in the program. The unit program is not open to any other job class members nor OPSRP members.

If you hire someone who is participating in the units program or a new employee who is eligible for and wishes to participate in the unit program, you must submit a new P&F Unit Purchase form to PERS so you can report the after-tax payroll deduction.

Note for local governments: If you are a local government employer submitting two Detail 2 records for pay periods crossing monthly boundaries and you've just hired a Tier One/Tier Two Police and Fire member who is participating in the unit program, or you have a current Tier One/Tier Two Police and Fire member just beginning participation in the unit program, then you need to enter unit contributions in **only one of the two Detail 2 records**. Do not split the unit contribution between the two Detail 2 records.

Optional Employer IAP Percentage, Contribution

These fields are only used if you are reporting for an employer who has elected to provide the optional employer IAP to qualified employees. (Note: optional employer IAP is not the same thing as a voluntary contribution.)

If the employer has elected to provide the optional IAP, the employer will make the contribution to the employee's optional IAP account at the elected percentage rate between 1% and 6% of subject salary. The rate of contribution is identified when the employer elects to provide the optional IAP.

How to report

If you are reporting for an employer who has elected to provide the optional IAP, you will report two IAP account contributions for each qualified employee:

1. **The member's IAP**, which was established when the employee finished their waiting time and became a program member. Contributions to that IAP are 6% of subject salary reported as MPPT, EPPT, or MPAT.

2. **The optional employer contribution amount**, with contributions made on the member's behalf by the employer at an elected rate between 1% and 6% of subject salary. Enter the elected percentage along with the calculated dollar amount in the Optional Employer IAP Contribution field.

Job Class Code and Average Overtime

Leave these fields blank. You already reported this information when you hired the employee. If this information needs to change, submit a Demographic Correction Request (DCR) asking PERS staff to make the change. In the Comments box, explain the reason for the change.

Editing a report

On the Work on Wage and Contribution Reports screen, locate the report that you want to edit under Unposted Regular Reports or Unposted Demographics and Adjustment Reports.

It will have a status of "Added."

1. Click "edit" next to the report.

    To correct a record in a suspended report, click "edit" for a report with a "suspended" status. For information about suspended reports, read employer guide 6, *Correcting Suspended Records*.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release
Added	08/31/2022	01/30/2007	delete	edit	n/a
Added	04/27/2022	03/04/2022	delete	edit	n/a
Added	04/27/2022	03/05/2022	delete	edit	n/a
Added	10/05/2022	10/01/2022	delete	edit	n/a
Added	10/27/2022	10/27/2022	delete	edit	n/a
Suspended	04/23/2021	12/29/2020	delete	edit	n/a

The Edit Retirement Detail Reports screen appears. It offers three options:

Option 1 – Return to the Work on Retirement Detail Reports page.

Option 2 – Enter the Social Security number (no dashes) of the employee for whom you would like to add a new record.

Option 3 – This option only applies to existing, unposted reports that contain records — not to new reports with no records. Click "select" to open the record. Make any edits and click **Save**.

EDIT RETIREMENT DETAIL REPORTS   ❓ Tell Me More

You may view, add, or edit any unposted records on the current report.

OPTION 1 - FINISHED EDITING THIS REPORT?

Finished Editing This Report? Click the **Done** button to return to the Work on Retirement Detail Reports page. You may re-edit this report at any time in the future until all records on the report are posted.

[Done]

OPTION 2 - ADD OR EDIT A RECORD

You may add a new record or edit an existing record. Enter a Social Security Number to view or edit a record for that employee. Or add a new record by entering the Social Security Number and completing the form that appears on the following page.

SSN [   ]

[Add or Edit Record]

OPTION 3 - UNPOSTED RECORDS

Click on a record to make changes to the record. The following page will provide you with a list of errors found during the last nightly validation batch run for each employee record in this list.

Page# 1

Select Record	SSN	Employee Name	Reported Wage Code	Status	Record Type
select			-	Edited	DTL1

Releasing a report

Clicking "Release" is how you submit your report to EDX for processing. It is important to remember this step — your report is not submitted to PERS until you release it.

How to release your report

Release

After you add records to a report by one of the three methods explained in the "Populating a Report" section, you return to the Work on Wage and Contribution Reports screen. Now a "Release" link appears in the Release/Un-Release column for that report.

Click "Release" to submit your report for processing in that night's batch run. If you submit it on a weekend or holiday, your report will be processed in the batch run after the next business day.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Added	04/02/2024	03/24/2004	delete	edit	n/a	View Report	View Details	n/a
Added	04/09/2025	03/22/2025	delete	edit	n/a	View Report	View Details	n/a
Added	07/16/2025	03/26/2025	delete	edit	Release	View Report	View Details	n/a
Added	06/16/2025	04/16/2025	delete	edit	n/a	View Report	View Details	n/a

CONFIRMATION

ⓘ Information

The report has been released for tonight's processing.

Un-Release

After you click "Release," the option changes to "Un-Release." Choose that option if for some reason you decide your report is not ready and you do not want it processed in the batch run. You have until 9:00 p.m. Pacific Time on a weeknight (when the batch run begins) to choose that option.

Click "Release" again when your report is ready for processing.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Added	04/02/2024	03/24/2004	delete	edit	n/a	View Report	View Details	n/a
Added	04/09/2025	03/22/2025	delete	edit	n/a	View Report	View Details	n/a
Added	07/16/2025	03/26/2025	delete	edit	Un-Release	View Report	View Details	n/a
Added	06/16/2025	04/16/2025	delete	edit	n/a	View Report	View Details	n/a

Delete

Before your report is released, you can choose to completely delete it. Once you do this, you cannot retrieve the report.

Edit

Use "edit" to review any records before releasing the report, including records uploaded with a dat file.

n/a

Once a report has been processed overnight, it cannot be released or un-released; the link in the Release/Un-Release column changes to "n/a." A report that has been suspended and a new report that has no records added also display "n/a" in the Release/Un-Release column.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Added	04/02/2024	03/24/2004	delete	edit	n/a	View Report	View Details	n/a
Added	04/09/2025	03/22/2025	delete	edit	n/a	View Report	View Details	n/a
Added	07/16/2025	03/26/2025	delete	edit	Un-Release	View Report	View Details	n/a
Added	06/16/2025	04/16/2025	delete	edit	n/a	View Report	View Details	n/a

Appendix A: Wage codes

Code	Name	Use to report
01	Regular Wages	A qualifying employee's regular wages.
02	Regular/Non-Qualifying	A non-qualifying employee's regular wages.
04	Retroactive Payment	Pay that is applicable to a prior pay period and meets the statutory definition of retroactive payment. Report each affected pay date in a separate record.
05	Positive Adjustment	A positive adjustment (i.e., an addition) to amounts reported for a previous pay date for an employee. Values entered will be added to the amounts previously reported for the pay date. Pay date entered must be a previously reported pay date.
06	Negative Adjustment	A negative adjustment (i.e., a subtraction) to amounts reported for a previous pay date for an employee. Values entered will be subtracted from the amounts previously reported for the pay date. The pay date entered must be a previously reported pay date. (Note: Do not input a negative sign.) Only reverses a record in which wage code 01, 04, 05, or 08 was used.
07	Retired/No Contributions	Wages earned by a retiree working for a PERS-participating employer with a pay date prior to 1/1/2020 or disability wages earned after 1/1/2020.
08	Contributions/No Service	Wages for an employee who is not working but is receiving wages over the summer months. It cannot be used during wait time.
11	USERRA Qualifying Wages	Wages a military employee would have received had they not left for military duty. Reporting the wages the employee would have earned under wage code 11 enables the employee to earn retirement benefits for military duty that qualifies for the Uniformed Services Employment and Reemployment Rights Act (USERRA).
14	Negative Adjustment/No Contributions	A negative adjustment to (i.e., a subtraction from) a previous pay period for an employee whose wages were previously reported without contributions (02 or 07). Only wage and service fields requiring adjustments should be reported. The fields reported will be subtracted from the previously reported amounts.
16	Negative Adjustment - USERRA Wages	Negative adjustment to USERRA wages. Use to reduce USERRA wages previously reported.

17	Retiree Wage - ER Rate	Wages earned by a PERS retiree with a pay date of 1/1/2020 or later who is working for a PERS-participating employer.
18	Negative Adjustment Retiree Wage - ER Rate	Negatively adjust (i.e., subtract) Retiree Wage-ER Rate wages for a service retiree with a pay date of 1/1/2020 or later.

Appendix B: Status codes

The status code tells PERS your employees' current status, such as this is a new hire, this person is leaving employment, this person is going on leave, or

Status code	Name	Used to report
00	No Change in Status	A change of demographic information for an existing employee with no change in job status (e.g., new address or a name change).
01	Qualifying New Hire	Reporting a new employee who will work 600 or more hours/year and qualify for PERS benefits.
02	Terminated	Someone who leaves your employment because of termination, layoff, job change, or retirement.
03	On Family Leave	The beginning of an employee's family leave (one that is unpaid by the employer but may be paid by a third party).
04	On Career Development Leave	The beginning of an employee's unpaid career development leave.
05	On Military Leave	The beginning of an employee's military service (unpaid by the employer but may be paid by the military employer).
06	On Legislator Leave	The beginning of a legislator's leave to serve in the Legislative Assembly.
07	On Leave of Absence	The beginning of an unpaid leave that will last more than one-half of the calendar days in a calendar month (reference Oregon Administrative Rule 459-005-0015).
08	Return From Leave	The first day back at work after any type of unpaid leave.
09	Seasonal Leave of Absence	The beginning of a leave caused by seasonal work. Keeps the job segment active until employee returns to work.
10	Deceased	An employee's death. Adds a termination date to member's account as of the date of death and notifies ESC of the member's death.
11	Retiree New Hire with Hour Limit*	New hire of a PERS retiree. Most retirees are hired with this status code whether or not they are limited in the hours they can work

Status code	Name	Used to report
12	Retiree New Hire without Hour Limit*	New hire of a PERS retiree who qualifies for an exception to the pre-Senate Bill 1049 annual hour limits. View the list of exceptions.
13	New Hire - Retiree Return to Service	A retiree who is canceling their retirement and returning to active service. Once this cancellation is posted, retiree must be hired as 01 – Qualifying New Hire. They must apply for retirement again when they are finished working.
14	n/a	Inactive code. Do not use.
15	Non-Qualifying Hire	A new part-time employee who will work fewer than 600 hours/year and not qualify for PERS benefits.

*Senate Bill (SB) 1049 (2019) lifted the restrictions on how many hours most retirees are allowed to work in a year (restrictions remain for early retirees unless they take a six-month break from working for any PERS-participating employers). SB 2296 (2023) extended the working retiree provisions through calendar year 2034. Employers should continue to use status code 11 when hiring a retiree, however. To learn more, go to the PERS employer Work After Retirement webpage.

Appendix C: About the Employer Service Center (ESC)

Who the ESC representative are

ESC is made up of more than 20 specially trained PERS experts. Most of these experts are split into three teams that specialize in specific employer-reporting issues:

1. Local governments.

2. State agencies.

3. Schools, Oregon university system, and community colleges.

Every employer is designated one account representative. If your representative is unavailable, you can contact any member of your ESC account team. ESC contact information is listed on the ESC Representatives webpage.

What they do

The focus of the ESC is assisting employers with their reporting in EDX and understanding how PERS rules and laws apply to them.

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 help make sure you get to the right person in PERS Member Services to get your questions answered.

Who they support

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 personal account, they can call Member Services at 888-320-7377 on weekdays between 8:30 a.m. and 5:00 p.m. Pacific Time.

How to reach ESC

By email

ESC representatives are available to answer emailed questions Monday to Friday from 8 a.m. to 5 p.m. Pacific. Email your assigned representative directly or the Employer Support inbox. Most emails are answered within 24 hours.

By phone

ESC representatives are available to assist by phone Monday to Friday. Call your assigned representative's direct phone line (listed on the ESC Representatives webpage) between 8:00 a.m. to 4:00 p.m. or the Employer Call Center line between 8:30 a.m. to 12:00 p.m. at 888-320-7377.