

# OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



September Webinar

## **Eligibility Exception Reports**

September 24, 2025

Employer Service Center Training



# Agenda

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- Quick reminders
  - Status checks
  - Opening an employer reporter account
- Employee Eligibility Exception reports
- Interpreting the results
- Changing position type
- Question-and-answer time

# Quick reminders

## Status checks

### When

Every time you are preparing to report a new hire to PERS — whether they are qualifying, non-qualifying, 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 4 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 access.

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

**EMPLOYER CONTACTS DETAILS**

\* - indicates required fields.

Contact Type: Payroll ▼

SSN

First Name\*

Middle Initial

Last Name\*

Address 1

Address 2

Address 3

City

State ▼

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.

Instructions on next slide.

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       |                | Smith     | john.smith@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.
- 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?      |
|                       |            |                |           |               | <div>yes</div> |

# Employee Eligibility Exception reports

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- 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:

- Have been reported with a non-qualifying wage code
- Or have three or more qualifying wage codes without contributions during the selected year
- And their net hours are exceeding 550.

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

- Have fewer than 600 hours with all employers in the specified year.
- Have been reported with a qualifying wage code with contributions during the selected year.

# Eligibility Exception reports

## Who runs them and when

Employer reporters

and

Employer Service Center (ESC)  
account representatives have the  
ability 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

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- 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   |  | 9/5/2025   |  |
| 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  |
|    |                        |           |            | <b>Column D</b><br>Posted hours worked for this employer.<br>All members on this report are approaching the 600-hour mark. | <b>Column E</b><br>Unposted hours worked for this employer shows hours worked this calendar year that have not posted. | <b>Column F</b><br>Posted other employer hours shows hours they have worked with another employer or employers this calendar year. | <b>Column G</b><br>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     |                        | 9/5/2025              |                         |
| 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 prior CSD (Contribution Start Date) of 7/1/24 (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     |                        | 9/5/2025              |                         |
| 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 7/1/24 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 7/1/24, and position type would need to be switched to ACTIVE.

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     |                        | 9/5/2025              |                         |
| 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     |                        | 9/5/2025              |                         |
| 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 07/01/2025) 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     |                        | 9/5/2025              |                         |
| 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 for benefits

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     |                        | 9/5/2025              |                         |
| 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

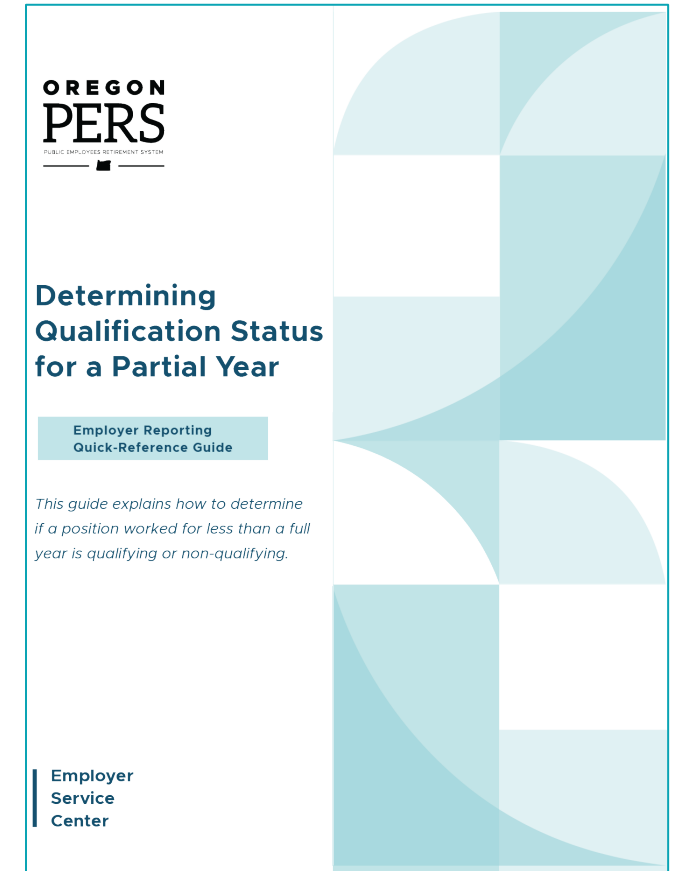
Employees who do not reach 600 hours because of working a partial year

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.



# Changing position type

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- Submit a Demographic Correction Request (DCR)

# Changing position type

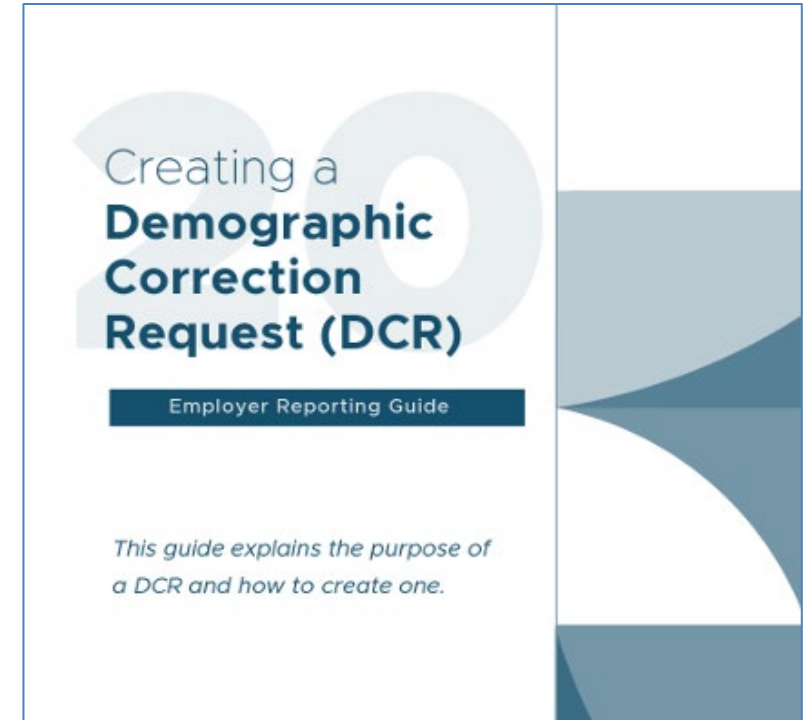
## Submit a DCR

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 PERS to make this change.

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

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



# Question-and-answer (Q&A) time

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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.

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.](#)

# OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



**Thank you**

[Employer Service Center  
contact information](#)

