OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM

January 21, 2026

Hire Intent and Detail 1 Member Demographics Record

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Employer Service Center

Agenda

- Quick reminders
- Hire intent
- Detail 1 Member Demographics record
- Questions and answers

Quick reminders

- Doing status checks with ESC
- Creating an employer reporter account
- Top four steps checklist
- Running reports
- Shoot for the star

Quick reminders

Doing status checks with ESC

When

Before you report a new hire to PERS, whether qualifying, non-qualifying, or working retiree.

Why

To find out if they are a member, work for other employers, are a PERS retiree, have 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 or phone.

Include employee's full name, birthdate, and last four digits of Social Security number. **Not entire SSN.**

Call Center

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

Phone
888-320-7377; select option 4 to reach ESC

Representatives

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

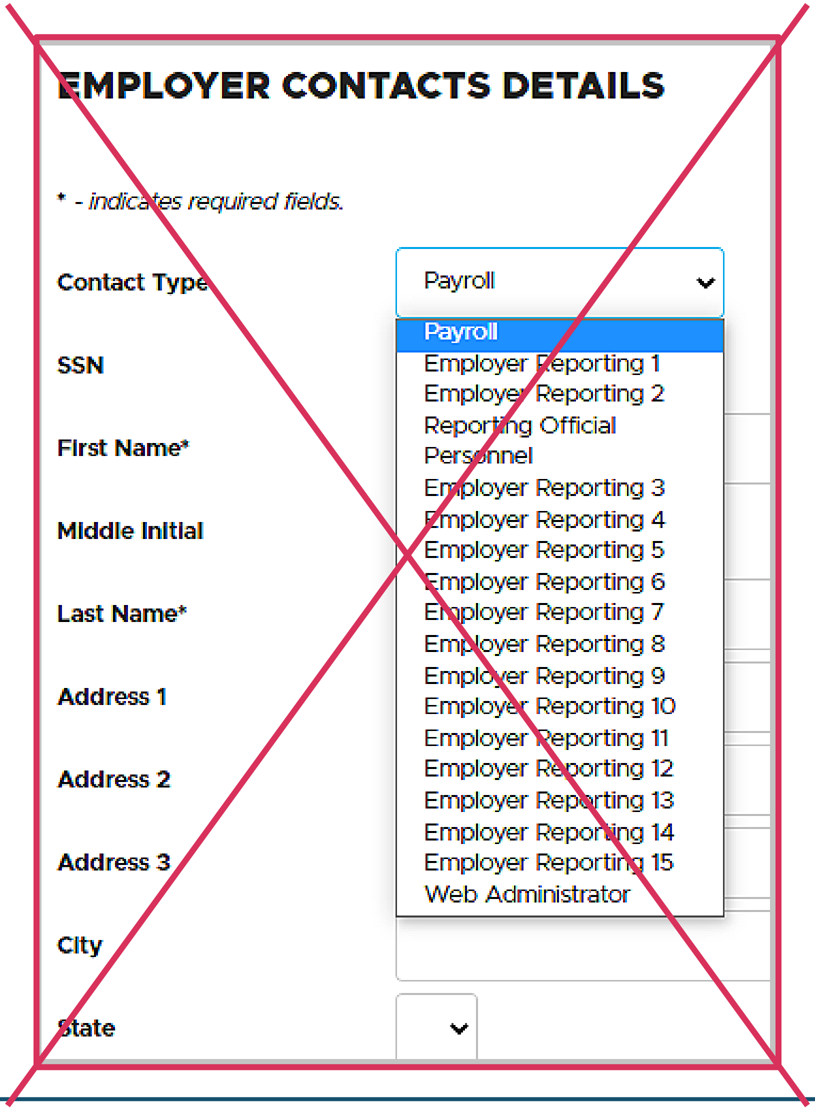
Phone numbers and emails
Listed on ESC webpage

Quick reminders

Creating a new employer reporter account

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

Note: 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.



NOT LIKE THIS

Quick reminders

Creating new employer reporter account

1. New employer reporter opens 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

LIKE THIS

2. Web administrator activates 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?
[illegible]	[illegible]		[illegible]	[illegible]	yes

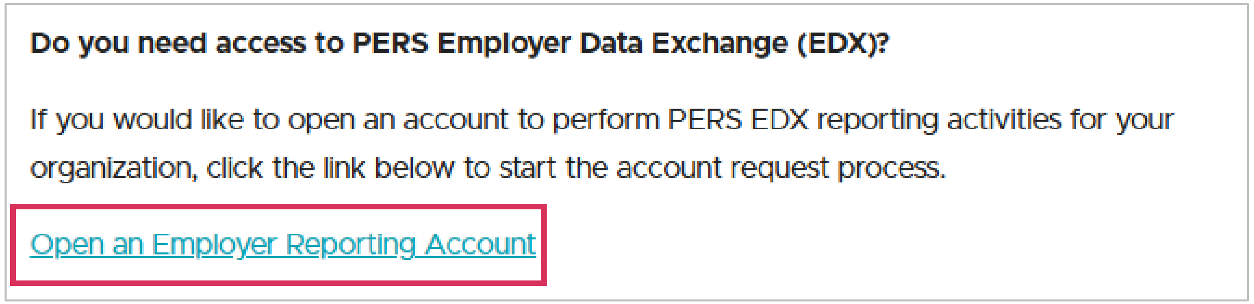
Quick reminders

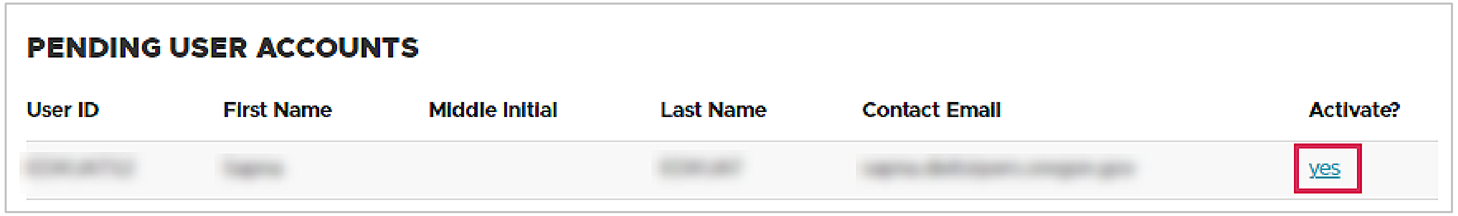
Creating new employer reporter account

Step-by-step process

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.





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."

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Quick reminders

Top four steps checklist

Correct and save all suspended records so that your reports post.

Run an Eligibility Exception report.

Check your Work List.

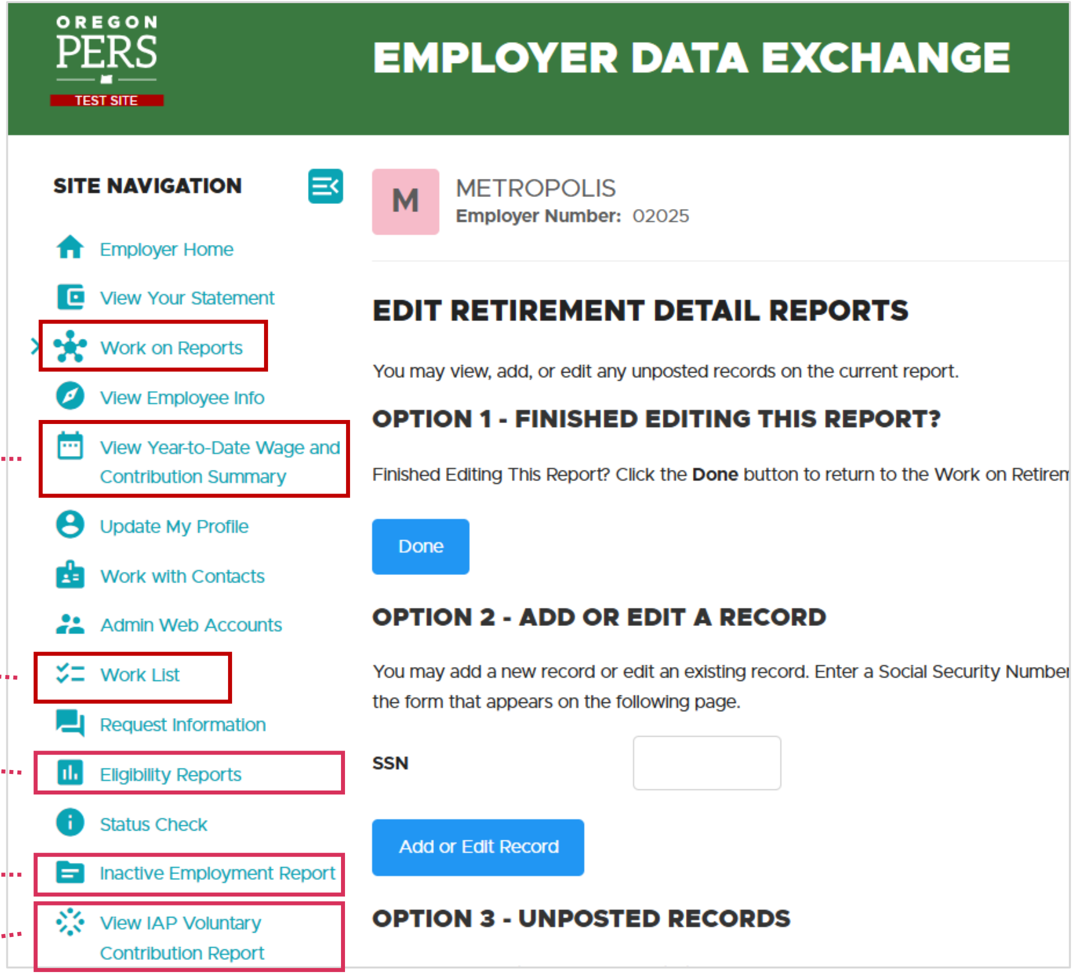
Create an Inactive Employee list.

Quick reminders

Running reports

Access reports through these Site Navigation menu items.

Instructions are in [employer guide 24, *Running Reports*].



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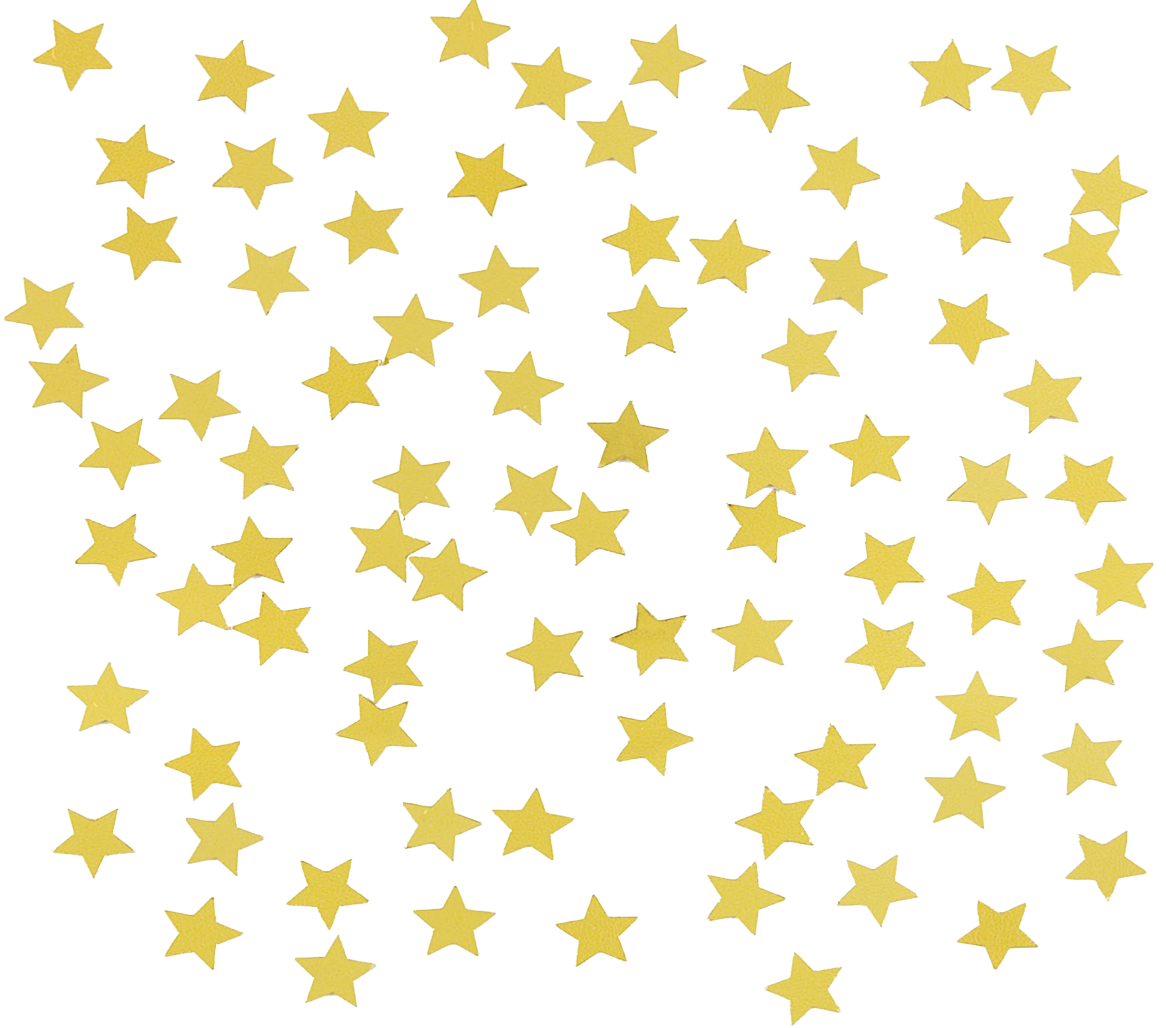
Quick reminders

Shoot for the star

Superhero Gold Star Award

Employers who submit 100% of their Regular reports on time* the whole calendar year receive this award from the Employer Service Center.



*Within three business days after the due date. Due dates are on the [EDX Regular Report dates webpage].

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Hire intent

- What is it?
- Where do you choose it?
- Where can you see it for an existing member?
- Where can employee see it?
- Can you change it?

Hire intent
What is it?

Hire intent

Employer determines if a position is “qualifying” or “non-qualifying.”

To determine, answer this question:

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

YES

The employee’s position is **qualifying**. Use status code 01 – Qualifying New Hire when you report the new employee.

NO

The employee’s position is **non-qualifying**. Use status code 15 – Non-Qualifying Hire when you report the new employee.

Qualifying = qualify to earn benefits by being hired into a job that requires 600+ hours/calendar year.

Non-qualifying = do not qualify to earn benefits because job requires fewer than 600 hours/calendar year, which is not enough to earn benefits.

Hire intent

Where do you choose it?

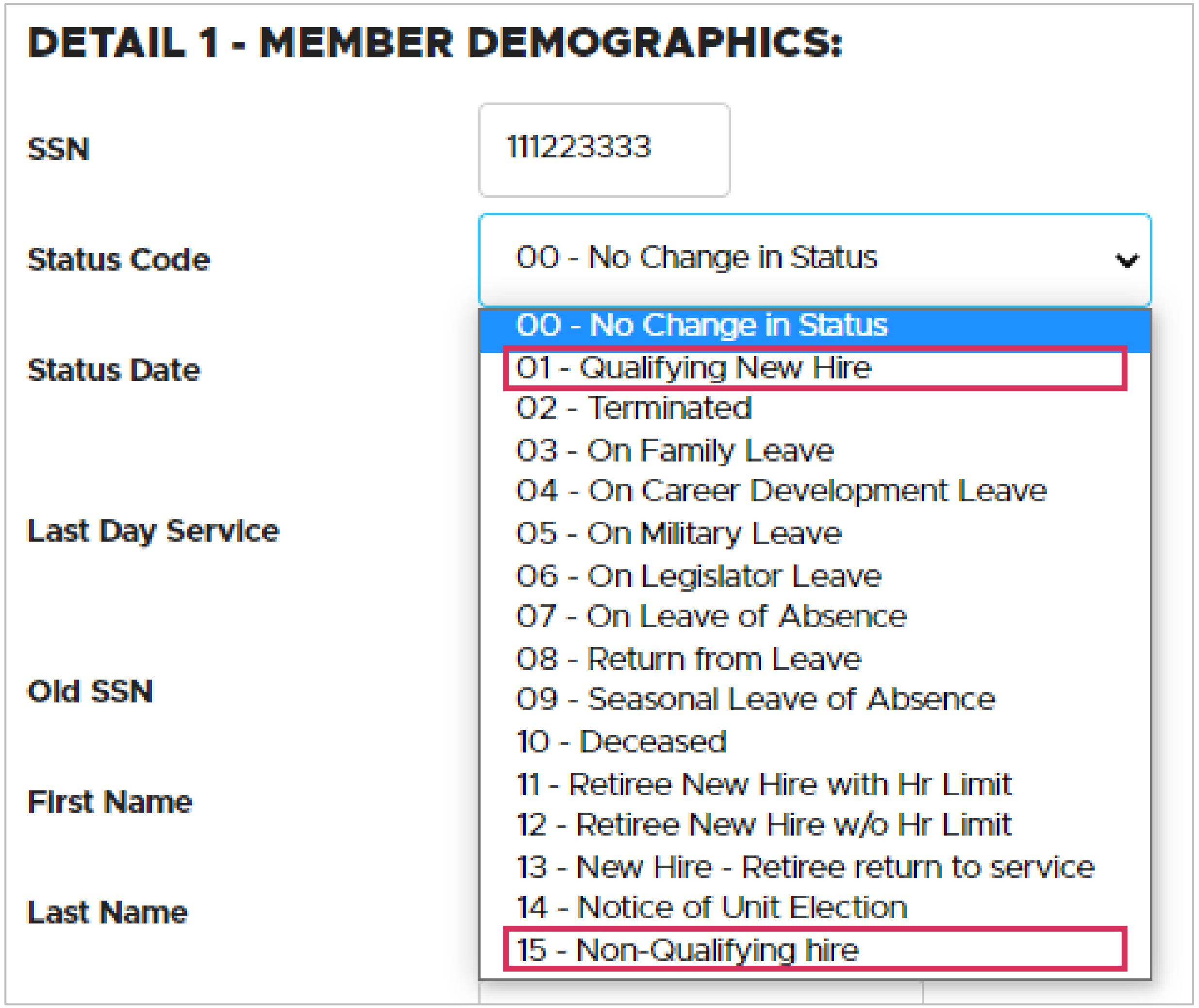
On a Detail 1 record when reporting a new hire.

Status Code options:

01 – Qualifying New Hire

15 – Non-Qualifying Hire

The status check with ESC can also help determine which status is the correct choice.



Hire intent

Where can you see it for existing member?

View Employee Info function

- Look employee up by name or SSN.
- Look under Employment History tab.

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

Employment History | Address Details | Salary Details | Demographic Correction Request (DCR) | Salary Breakdown Request

EMPLOYMENT HISTORY

Hire Intent	Start Date	Last Day Service	Term/End Date	Gross Unused Sick Leave	Transferred Unused Sick Leave	Job Class	Position Type	Plan
NQ	08/26/2019	06/18/2021	06/18/2021					
	08/26/2019		06/18/2021			School Employee	Non-Qualifying Service	OPSRP

Contribution Report

Determining hire intent

Where can employee see it?

In Online Member Services (OMS)

- Go to Member, then Employment Information.
- For instructions on getting an account and using OMS, read “How to Create and Use Your OMS Account.”
- Look in the Employment History tab.

EMPLOYMENT INFORMATION

Tell Me More

EMPLOYMENT HISTORY

Employer Name	Hire/Start Date	Termination/End Date	Unused Sick Leave	Job Class	Position Type	Contract Number of Months
PUBLIC EMPLOYEES RTMT SYSTEM	02/18/2020		0.000			
	02/18/2020			General Service	Active Service	00

Hire intent

Can you change it?

When job requirements change, you do not change the hire intent — you change the position type (specifically, you ask ESC to do it).

SITE NAVIGATION

- Employer Home
- View Your Statement
- Work on Reports
- View Employee Info
- View Year-to-Date Wage and Contribution Summary

EMPLOYMENT HISTORY

Hire Intent	Start Date	Last Day Service	Term/End Date	Gross Unused Sick Leave	Transferred Unused Sick Leave	Job Class	Position Type
N/A	06/08/2018						
	10/01/2020					School Employee	Retiree w/o Hour Limit
	06/08/2018		09/30/2020			School Employee	Retiree with Hour Limit
Q	11/01/1996		03/21/2018				
	01/01/2007		03/21/2018			School Employee	Non-Qualifying Service
Q	03/25/1990		06/18/1993				
	03/25/1990		06/18/1993			School Employee	Active Service

Hire intent

How do you change position type?

Position status changes

What happens when a person in a non-qualifying position works 600 or more hours in a calendar year?

Submit a DCR (Demographic Correction Request) form

If an employee has been entered as non-qualifying,

Then DOES work 600 hours (with one or more PERS-participating employers),

SUBMIT A DCR to change them to active service.

Eligibility Exception Report

This report can help you see the non-qualifying employees who are close to exceeding or have exceeded 600 hours.

Hire intent

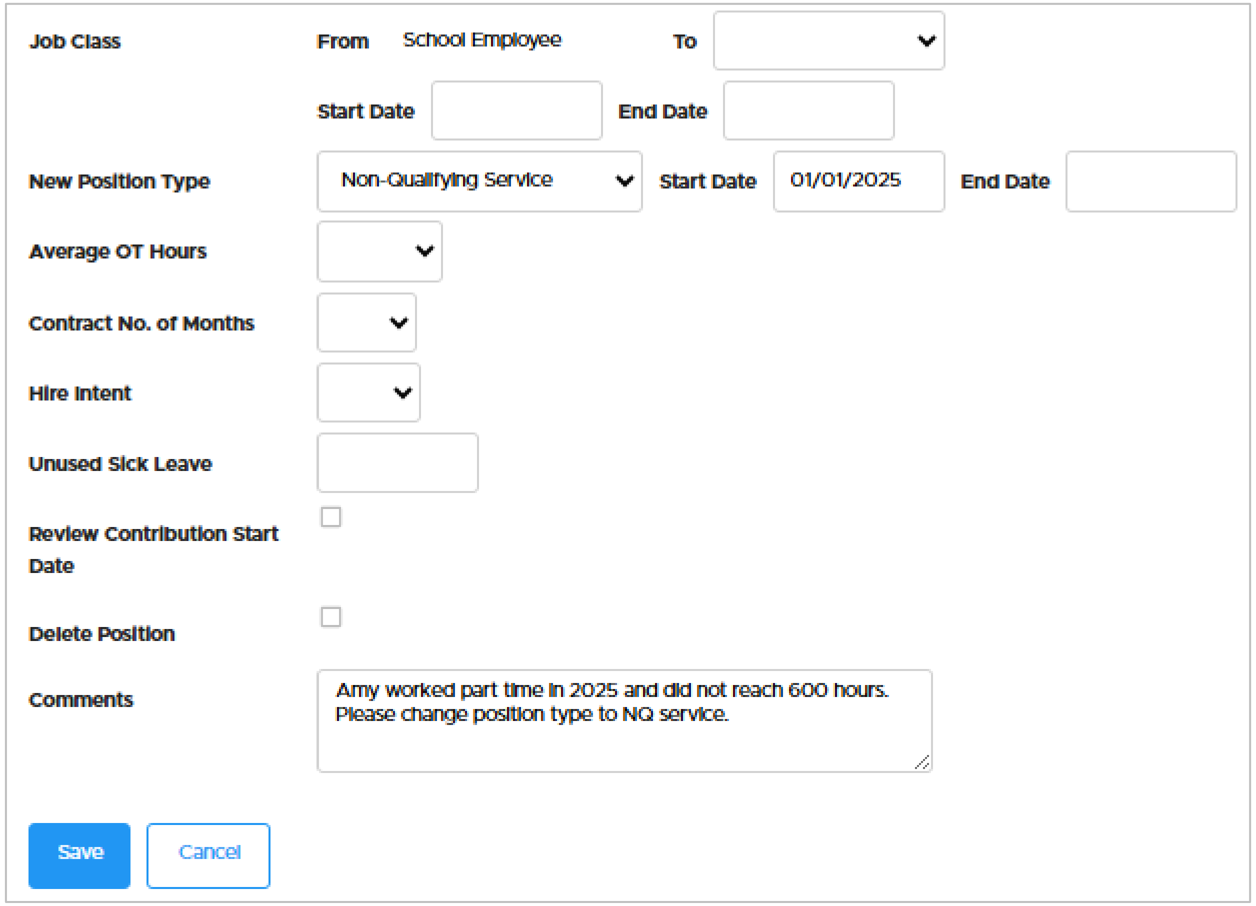
How do you change position type?

Position type changes

What happens when a person in a non-qualifying position works 600 or more hours in a calendar year (or vice versa)?

Submit a Demographic Correction Request (DCR) form

1. Create a DCR per instructions in guide 20.
2. Choose Active Service or Non-Qualifying Service from the New Position Type pulldown box.
3. Select start date.
4. Explain the reason in the Comments box.



Job Class From School Employee To

Start Date End Date

New Position Type: Non-Qualifying Service Start Date 01/01/2025 End Date

Average OT Hours

Contract No. of Months

Hire Intent

Unused Sick Leave

Review Contribution Start Date

Delete Position

Comments: Amy worked part time in 2025 and did not reach 600 hours. Please change position type to NQ service.

Save Cancel

Detail 1 Member Demographics record

- When to use
- Detail 1 fields
- How to report a new employee
- Fields required when reporting a new employee
- How to report a termination (or retirement)
- Fields required when reporting a termination
- Hiring a retiree
- Common errors
- Quick-reference guides

Detail 1 Member Demographics record

When to use

New hire:

- A new employee, rehire or returning employee, or retiree hire.

Termination:

- Employer/employee relationship ends.
- Employee is retiring.

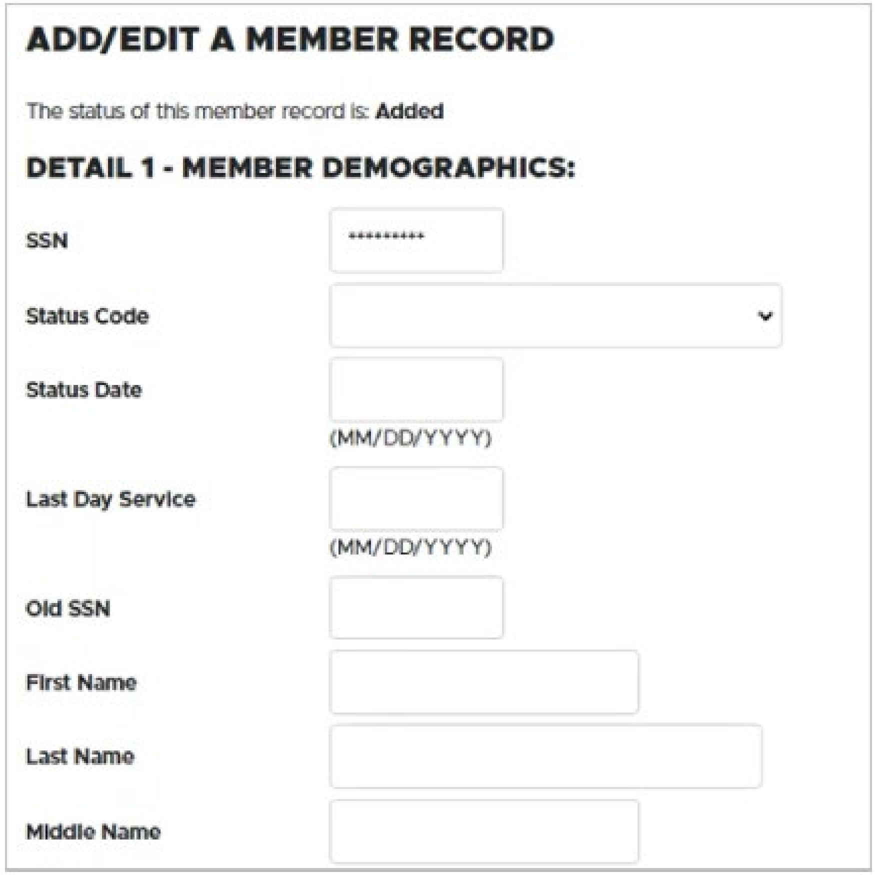
Leave of absence.

- Start of leave and return to work.

Name or address change.

SSN correction:

- DTL1 can only correct clerical error if one account exists.



ADD/EDIT A MEMBER RECORD

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

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN **********

Status Code

Status Date (MM/DD/YYYY)

Last Day Service (MM/DD/YYYY)

Old SSN

First Name

Last Name

Middle Name

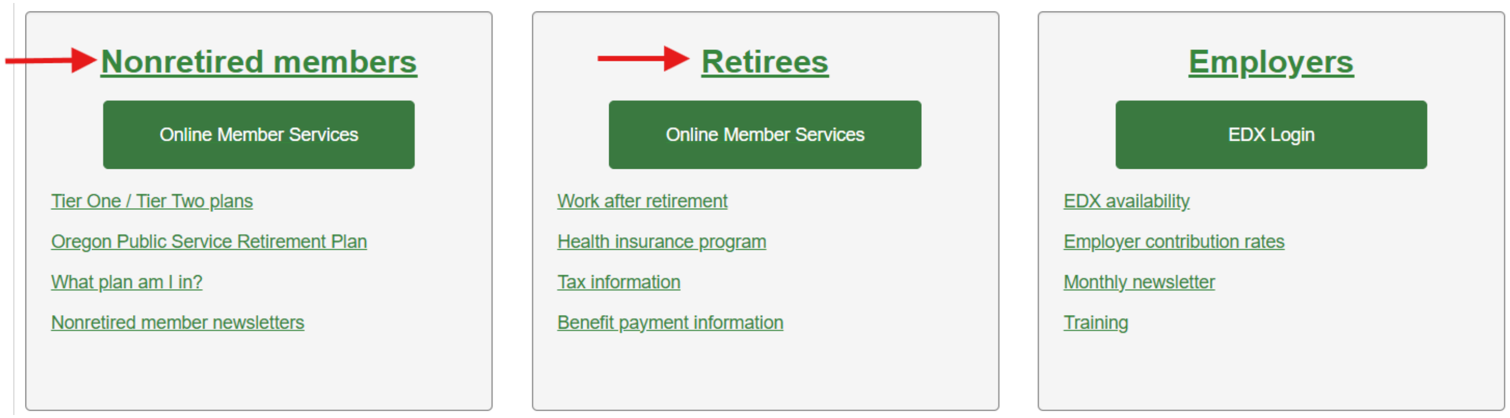
Submit a DCR to change:

- Date of birth
- Employee with two accounts under different SSNs.

Detail 1 Member Demographic record
Member services for employees to check if needed

Did you know? Employees can create an Online Member Services (OMS) account to see their membership information:

- Employer name
- Hire/start date
- Termination/end date
- Unused sick leave (Tier One and Tier Two members only)
- Job classification
- Position type
- Contract number of months (school employees only)



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Detail 1 Member Demographics record

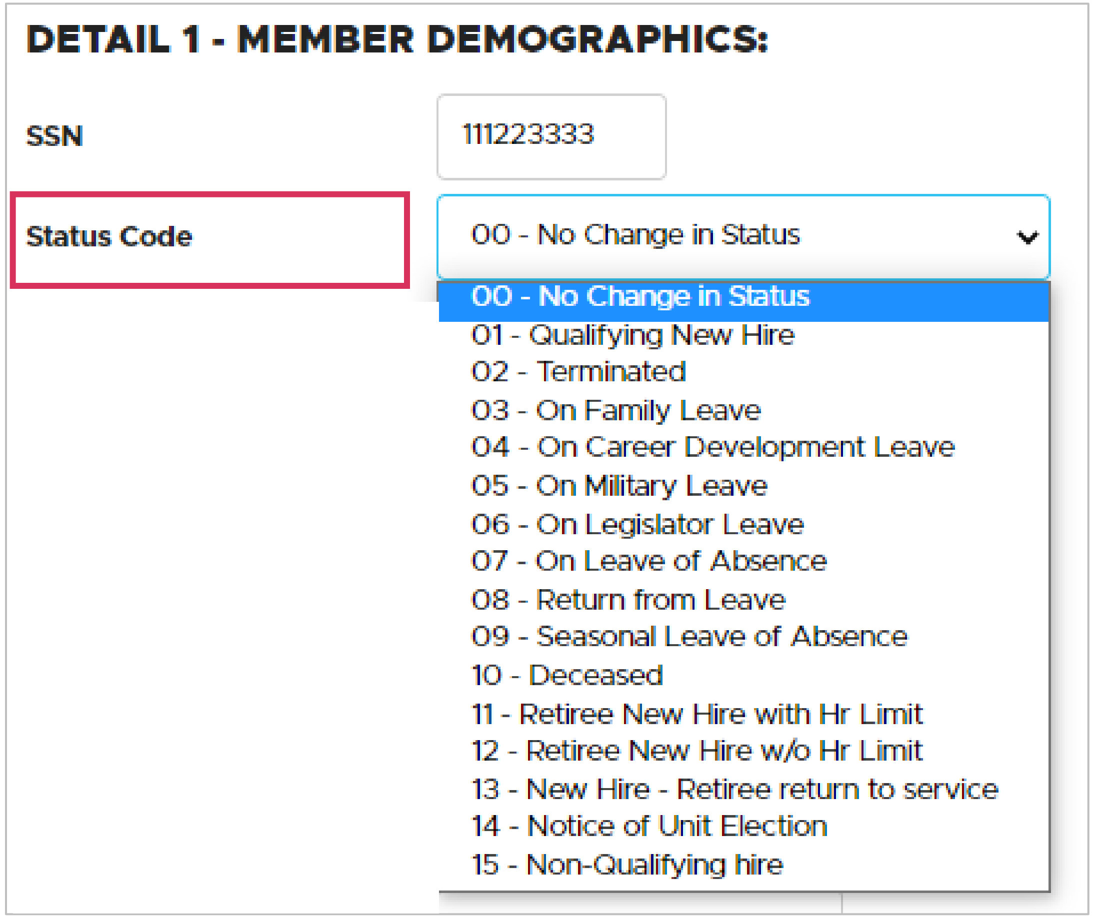
Detail 1 fields

Status Code — Required. Indicates what is happening with this employee with you, the employer, such as a new hire, termination, or leave of absence.

Use status code 00 when the employee's status remains unchanged but information about them changes, such as name or address.

If you are reporting a status change, such as a leave of absence, use the appropriate status code.

For a list and descriptions of all status codes, refer to *Status Codes* quick-reference guide.



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Detail 1 Member Demographics record

Detail 1 fields

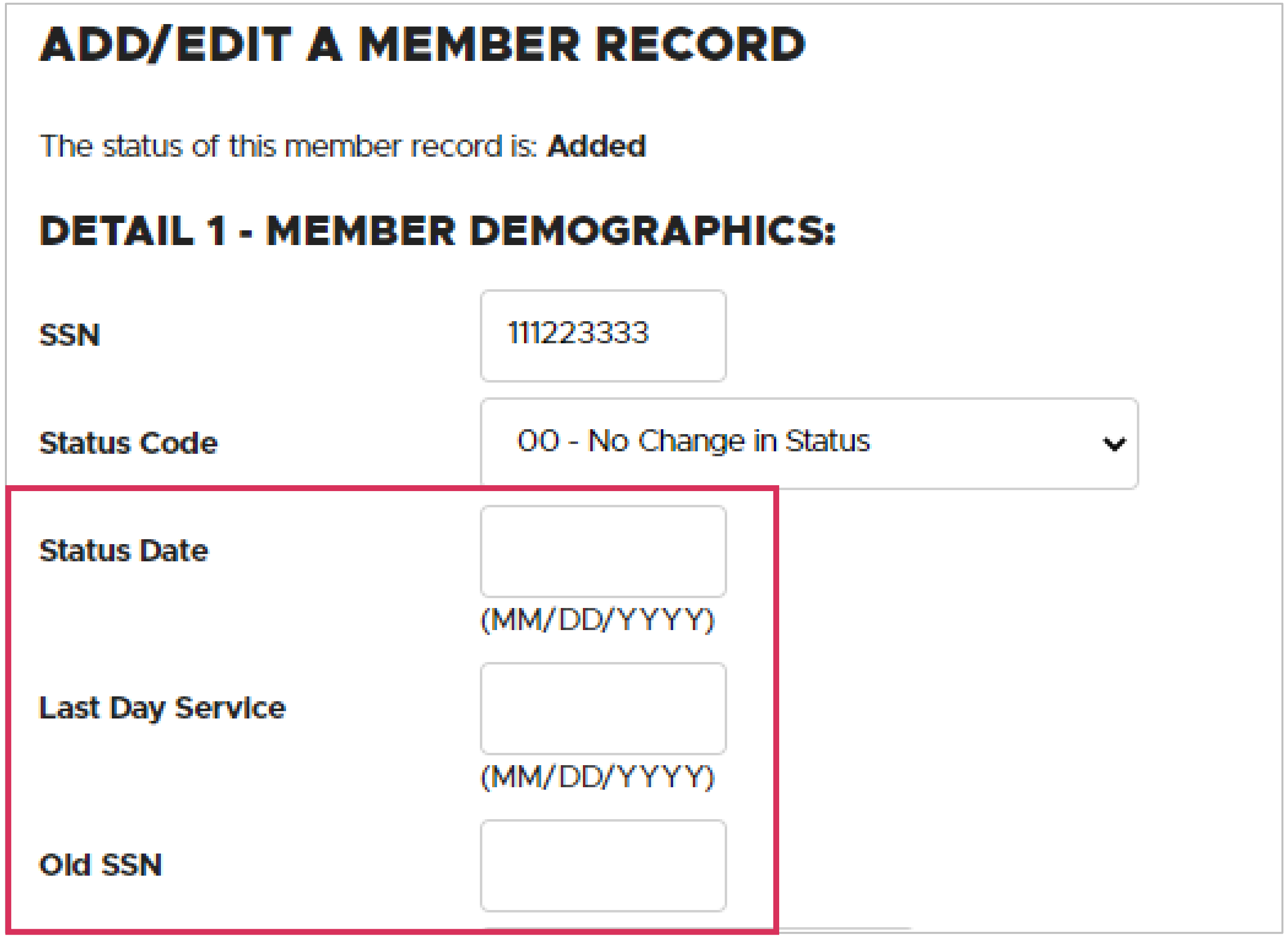
Status Date — The date on which the new status or demographic change begins (e.g., first day of leave, first day as an employee, date of death).

Last Day Service — Use when reporting a termination or death. Last day physically on the job or on employer-paid leave.

Old SSN — Use to correct a clerical error in Social Security number.

However, if you discover employee has two PERS accounts under two different SSNs, **contact your ESC rep for help**.

continued


ADD/EDIT A MEMBER RECORD

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

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN 111223333

Status Code 00 - No Change in Status

Status Date (MM/DD/YYYY)

Last Day Service (MM/DD/YYYY)

Old SSN

Detail 1 Member Demographics record

Detail 1 fields

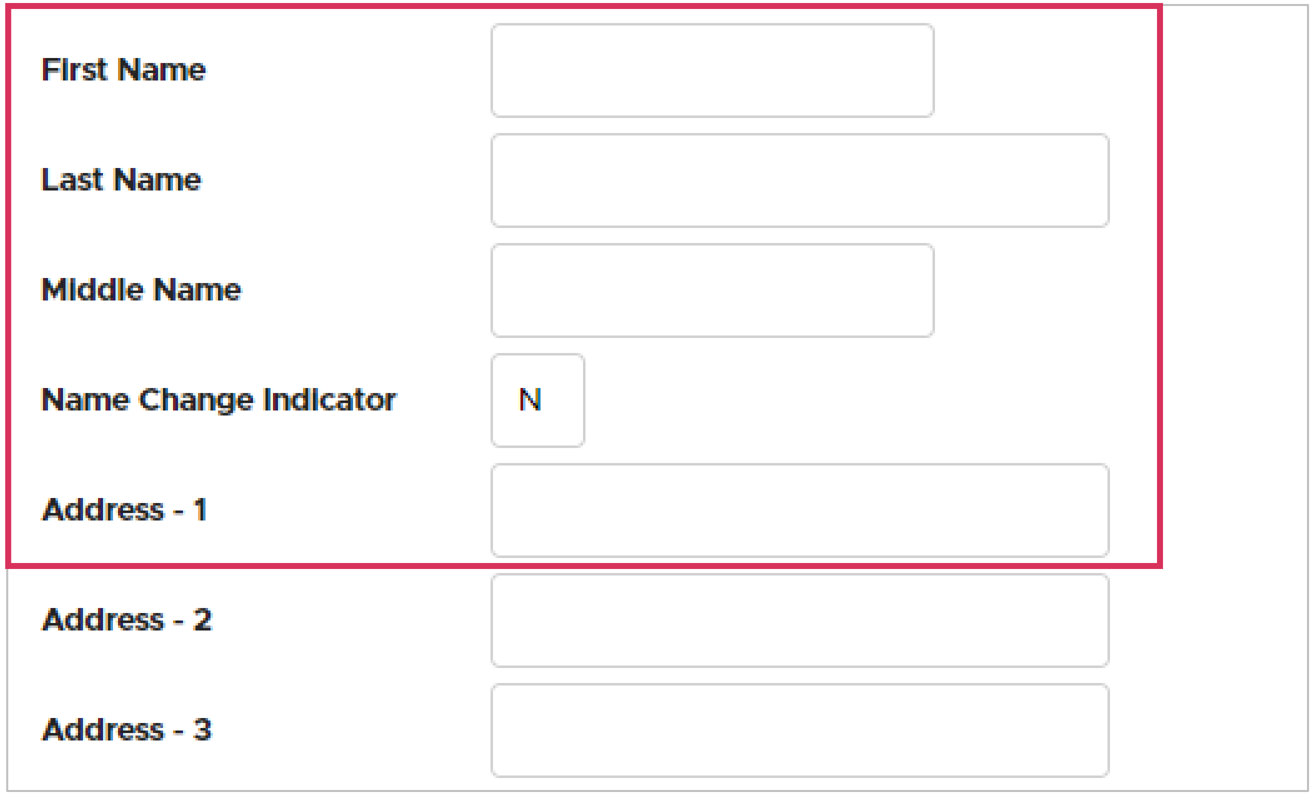
First Name — Required. Use all capital letters.

Last Name — Required. Use all capital letters.

Name Change Indicator — Required. “N” is the default. Choose “Y” if you are entering a name change for the employee.

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. Make sure to fill out the city, state, and zip code fields.

Address – 2 and 3 — Avoid using.



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Detail 1 Member Demographics record

Detail 1 fields

Province and Postal Code — Use for foreign address when country code is not “USA.”

Date of Birth and Gender — Required when reporting a new hire.

If your employee does not identify as male or female, follow the steps in employer reporting guide 7, *Reporting a New Employee*, section “Create a Detail 1 Member Demographics Record,” page 10.

continued

Detail 1 Member Demographics record

Detail 1 fields

PERS Job Class Code — Required on new hire record. The most common job classifications are:

- 01 - General Service.
- 02 - Police and Fire.
- 09 - School Employee.

Job class codes defined in quick reference guide *Job Classification Codes*.

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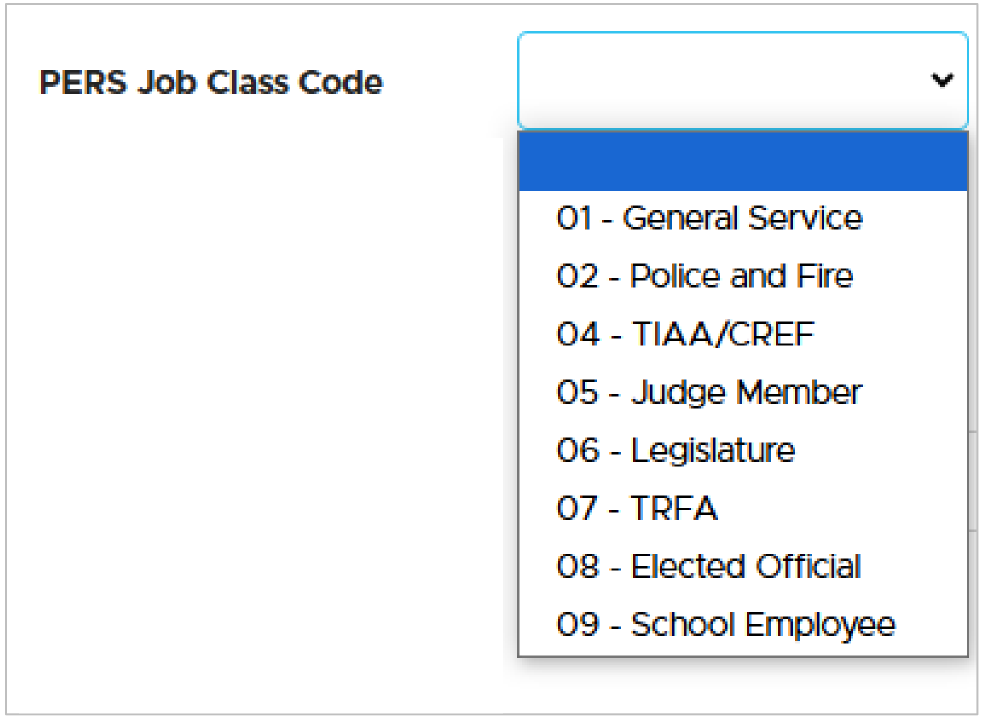

Detail 1 Member Demographics record

Detail 1 fields

Average Overtime Hours — Only filled in on new-hire record.

Choose number of hours of annual overtime reasonable, required, or expected for that employee class, group, or job type. Round up to nearest hundred.

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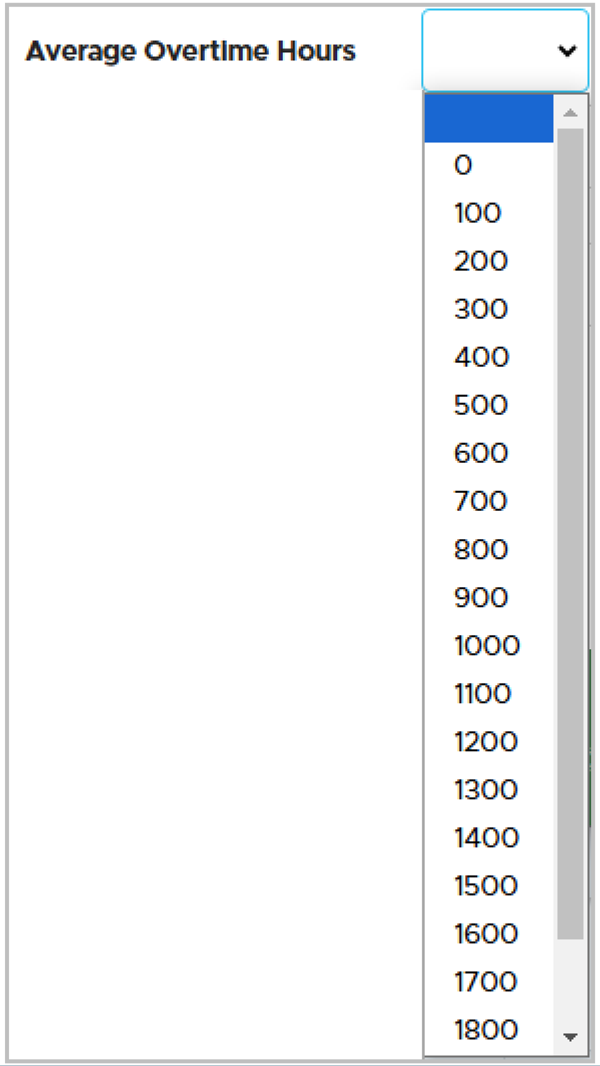
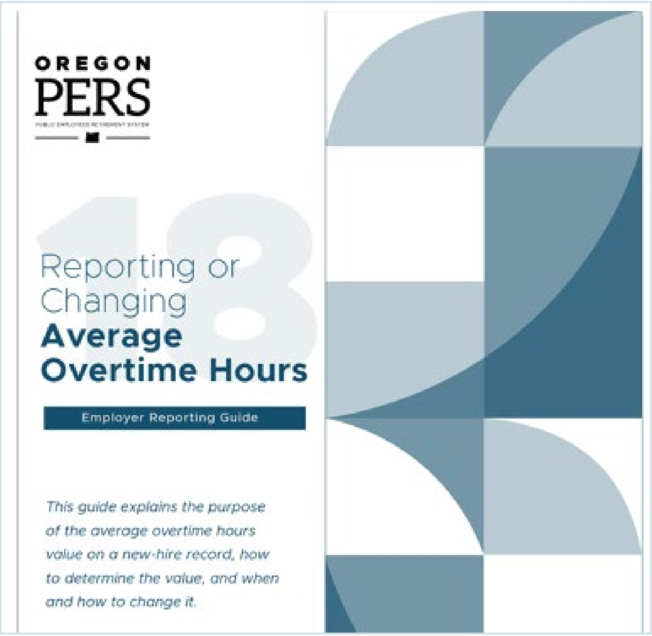




Instructions are in employer guide 18, *Reporting or Changing Average Overtime Hours*.

Detail 1 Member Demographics record

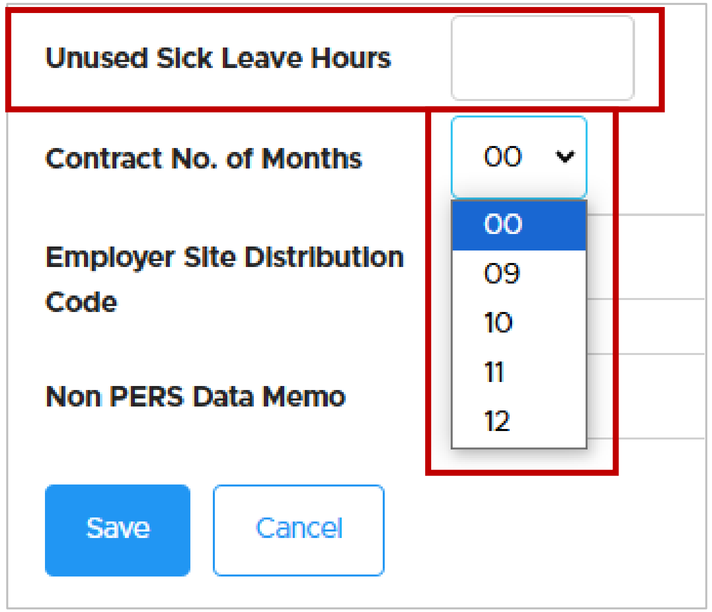
Detail 1 fields

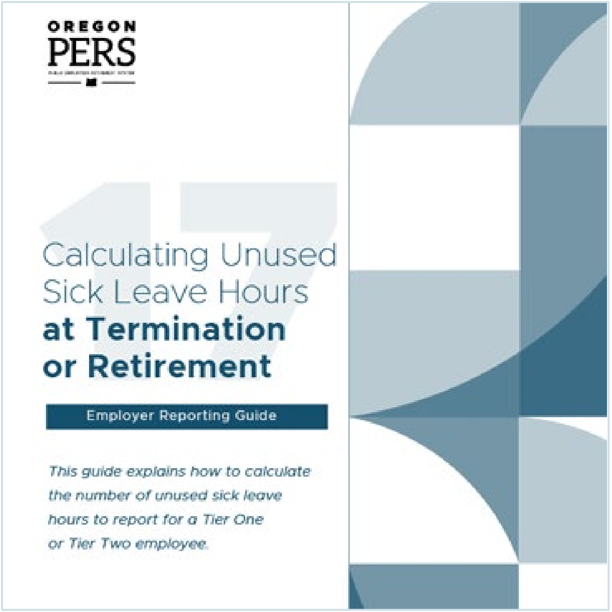
Unused Sick Leave Hours — Required only when reporting death or termination for Tier One/Tier Two employees whose employer participates in Unused Sick Leave program.

Contract No. of Months — **School employers only.** School employers select the number of months their school is open for work. All others leave default of 00.

Employer Site Distribution Code — Optional field.

Non PERS Data Memo — Optional field.





Instructions on calculating unused sick leave hours are in *guide 17, Calculating Unused Sick Leave Hours at Termination or Retirement*.

Detail 1 Member Demographic record

How to report a new employee

Watch the step-by-step video on the newly revised Employer Training page on the PERS website.

Click on Training Video Library.

Scroll down to Employer-Reporting videos.

[Reporting a New Employee]()

Training

The Employer Service Center (ESC) provides training for employer reporters and web administrators at all skill and experience levels.

- Beginner employer-reporter training and resources +
- Training webinars (upcoming and past) +
- Self-learning materials (resources and guides) +
- Training video library +
- Customer support +

Employer-reporting videos

These videos explain the roles of employer reporters and web administrators, demonstrate simple EDX instructions, and explain reporting concepts.

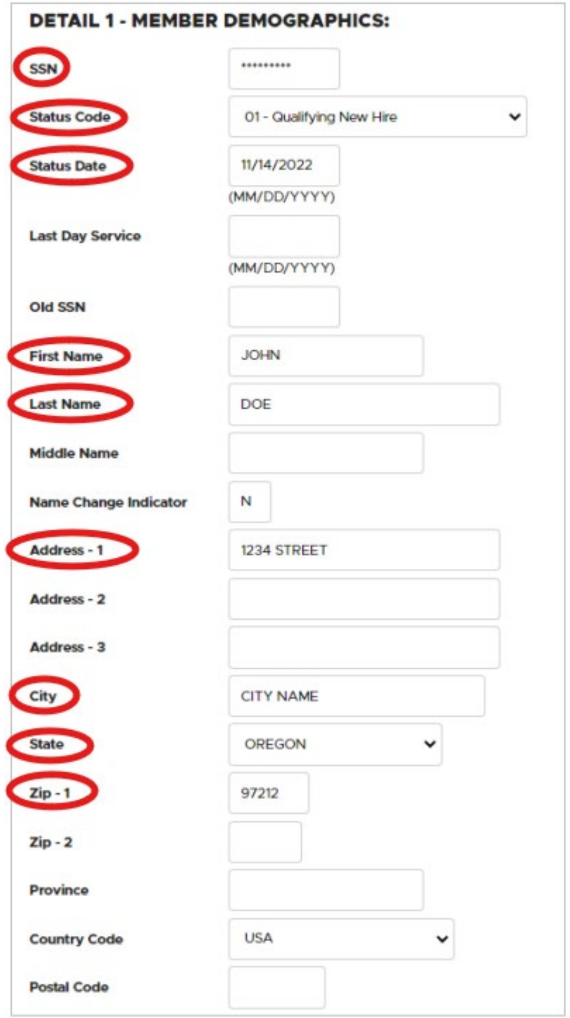
Title and link	Description
PERS Employer-Reporting Video Series: **Reporting a New Employee**	Watch step-by-step instructions for creating a new-hire record in EDX. Understand how to fill in address, Average Overtime Hours, and Contract No. of Months fields, then release the report. Includes steps for requesting a gender change to non-binary.

Detail 1 Member Demographics record

Fields required* when reporting a new employee

- * Social Security Number
- * Status Code: Most often 01 Qualifying New Hire or 15 Non-Qualifying New Hire
- * Status Date
- * First Name
- * Last Name
- * Address
- * City
- * State
- * ZIP code

TIP: Per postal-service standard, use all capital letters for text.



DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	*********
Status Code	01 - Qualifying New Hire
Status Date	11/14/2022 (MM/DD/YYYY)
Last Day Service	(MM/DD/YYYY)
Old SSN	
First Name	JOHN
Last Name	DOE
Middle Name	
Name Change Indicator	N
Address - 1	1234 STREET
Address - 2	
Address - 3	
City	CITY NAME
State	OREGON
Zip - 1	97212
Zip - 2	
Province	
Country Code	USA
Postal Code	

List of all required fields is in *Detail 1 Member Demographics Fields* quick-reference guide.

Detail 1 Member Demographics record

Fields required* when reporting a new employee

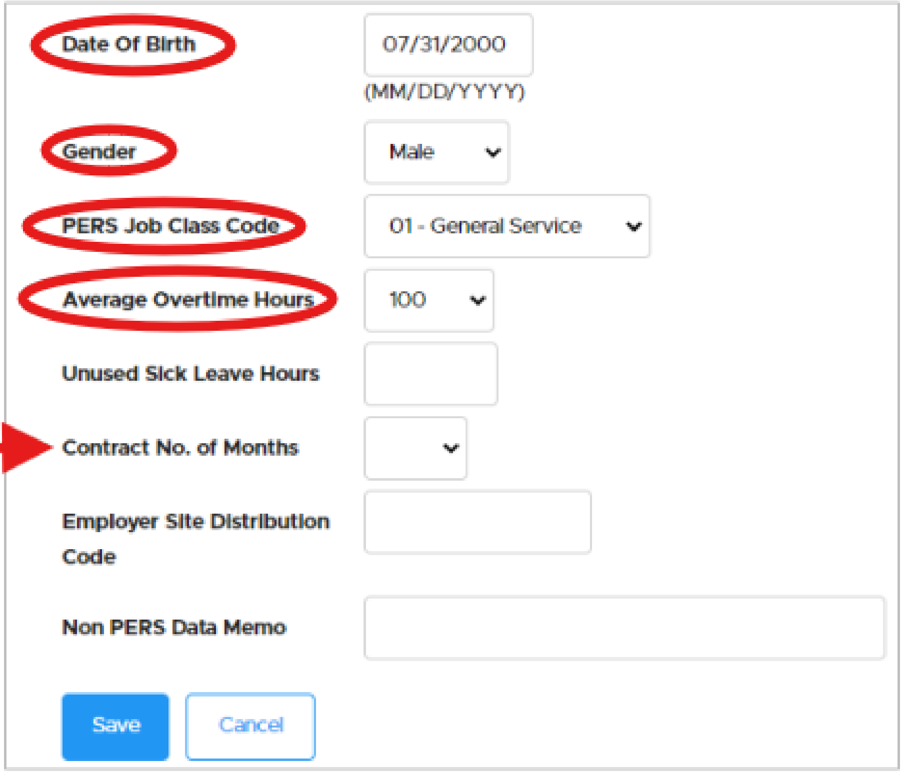
* Date of birth
* Gender (M or F) Submit DCR if your employee identifies as non-binary or other
* Job Class Code. Most common:

  01 - General Service.

  02 - Police and Fire.

  09 - School Employee.
* Average Overtime Hours: For the employee class, not the individual.
* **School employers only**: Enter Contract Number of Months

School Employers



Date Of Birth: 07/31/2000 (MM/DD/YYYY)

Gender: Male

PERS Job Class Code: 01 - General Service

Average Overtime Hours: 100

Unused Sick Leave Hours

Contract No. of Months

Employer Site Distribution Code

Non PERS Data Memo

Save | Cancel

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Detail 1 Member Demographic record

How to report a termination (or retirement)

STEP 1

Report their final wages

1. Create a Detail 2 Wage and Contributions record that contains the employee's final wages and IAP contribution (if qualifying).
2. Release it with your Regular report.
3. On the next business day, make sure the record posted.

STEP 2

Correct any unposted records

1. Run Year-to-Date Wage and Contribution Summary Report.
2. Locate and correct unposted records.
3. Resave records.
4. Make sure they posted.

STEP 3

Report their termination

1. Create a Detail 1 Member Demographics record with a 02 - Termination status code.
2. Release it with your Demographics and Adjustment report.
3. On the next business day, make sure the record posted.

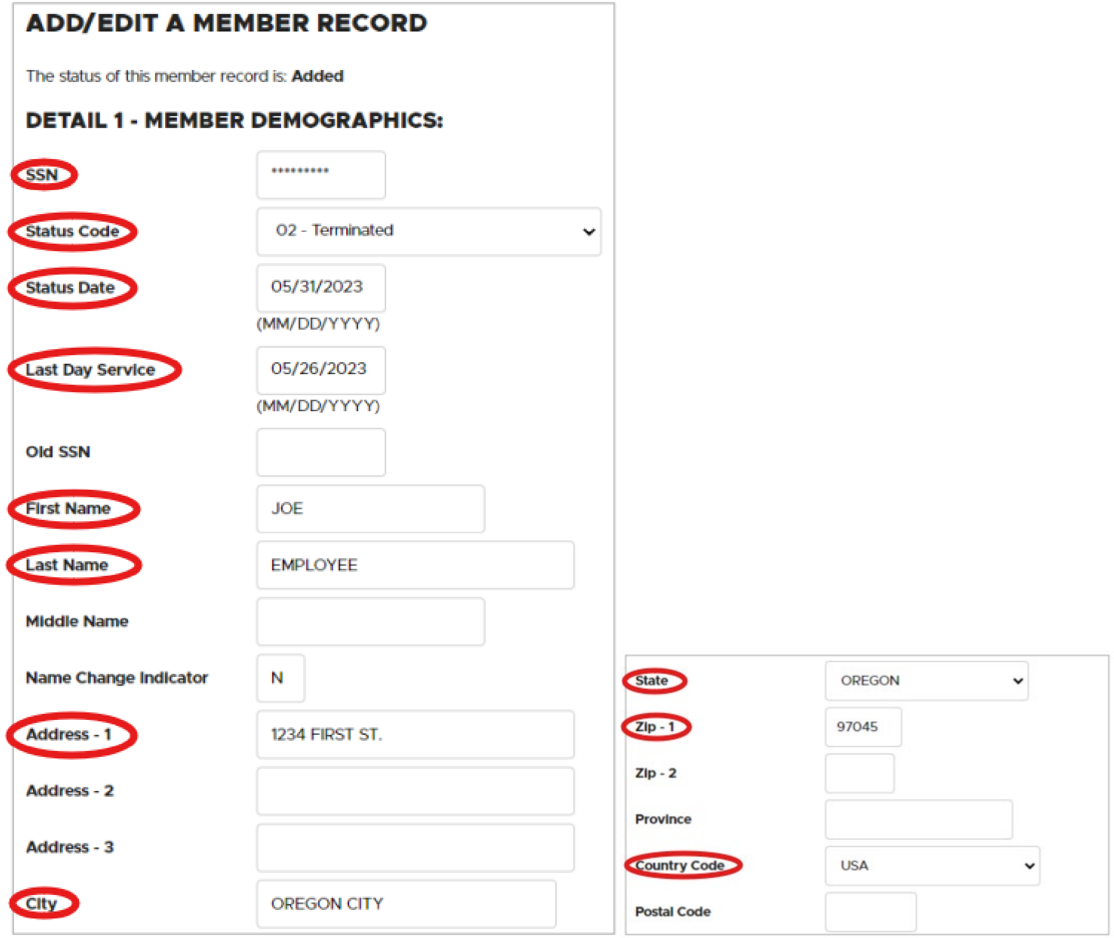
Employer guide 15, *Reporting a Termination or Death*

Employer guide 16, *Reporting a Retirement*

Detail 1 Member Demographic record

Fields required* when reporting a termination (retirement)

* Social Security Number: prefilled.
* Status Code:
  - Use 02 Termination.
  - Use 10 when reporting a death.
* Status Date:
  - Termination date is the day the employee/employer relationship ended.
  - For retirement, must be last day of calendar month.
* Last Day Service:
  - The last day the employee worked or was on employer-paid leave. Can be same as or before the Detail 1 02 — Termination date, but never later than termination date.
* Name: auto fills.
* Address: all caps.



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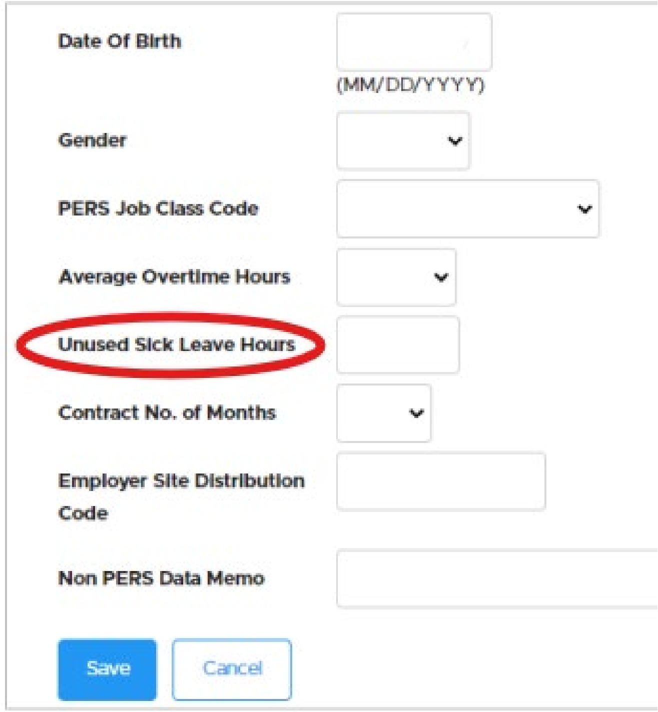
Detail 1 Member Demographic record

Fields required* when reporting a termination (retirement)

- * Date of Birth: auto filled
- * Unused Sick Leave Hours:
  - For Tier One/Tier Two, if your organization participates, calculate per [employer guide 17, *Calculating Unused Sick Leave Hours at Termination or Retirement*].
  - The field is required, so for OPSRP members and organizations that do not participate, enter 0.
  - Will cover in March 2026 webinar.



[Guide 16, *Reporting a Retirement*]

[Guide 17, *Calculating Unused Sick Leave Hours at Termination or Retirement*]

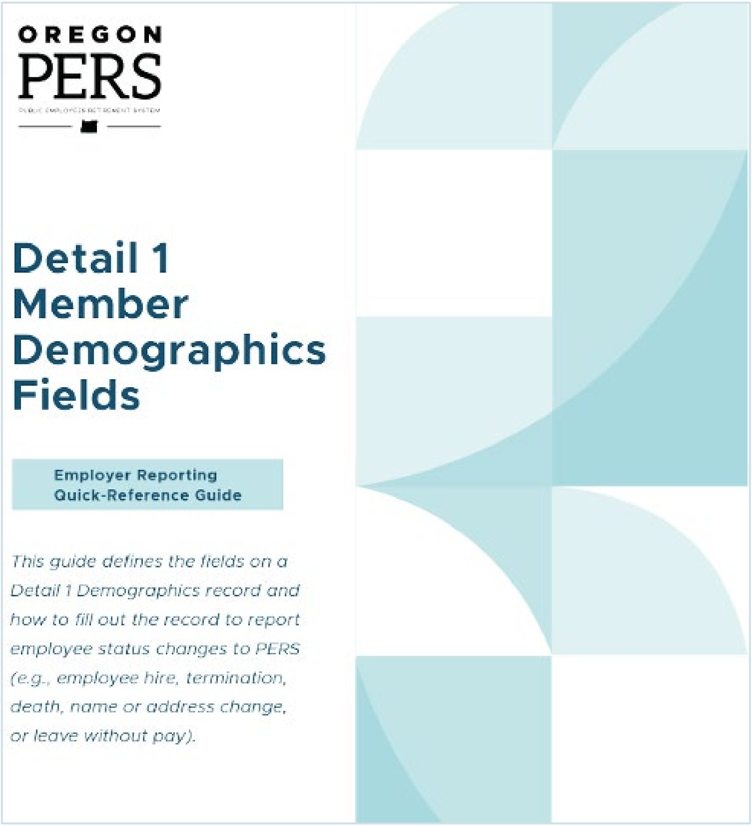
Detail 1 Member Demographic record

Fields required when reporting a termination (retirement)

Reference *Detail 1 Member Demographics Fields quick reference guide* to know which DTL1 fields are required when reporting:

- New employee.
- Termination or death.
- Leave without pay.
- Address change.
- Name change.
- Social Security number clerical correction.

PLUS How to correct posted demographic records.



Detail 1 Member Demographic record

Hiring back an OPSRP retiree

Keep in mind when hiring an OPSRP retiree who just retired:

- Contact ESC to do a status check.
- Complete the Detail 1 with status code 11.

If you receive this error message:

Error Messages For Member

- S - The Status Code is '11', '12', or '13', New Retiree Hire and the member is not retired as of the given date.

- Reach out to your ESC (Employer Service Center) account representative.
- There may be something we need to do within the system to get your record to post.

Learn more: Employer-Reporting-Guide 8-Hiring a PERS Retiree

Detail 1 Member Demographic record

Reminders to avoid errors when completing Detail 1

- ❑ Use expected hours for the position to determine hire intent.
- ❑ Submit a Detail 1 for all new hires, even if non-qualified.
- ❑ School employers make sure to enter contract number of months.
- ❑ Enter average overtime correctly.
- ❑ Submit a Detail 1 record when demographic information changes.
- ❑ Know when to use a Detail 1 and which fields are required.
- ❑ Reference resources or reach out when needed.

Detail 1 Member Demographic record

Quick-reference guides

Quick-reference guides
Listed on [Employer Manuals and Guides webpage.]

Link to webpage is also on the Training webpage in the Self Learning Materials section.

Every circled guide is helpful for creating Detail 1 records.

Employer Reporting Quick Reference Guides

Wage Codes

Definitions of wage codes used on a Detail 2 Wage and Service record. (Revised 02/2025)

Status Codes

Definitions of status codes used on a Detail 1 Member Demographics record. (Revised 02/2025)

Job Classification Codes

Definitions of PERS job classifications and descriptions of jobs that qualify for each job class. (Revised 01/2025)

EDX File Format and Development Guide

Format specifications and requirements for uploading Detail 1 and Detail 2 record data files to EDX. (Revised 07/2025)

Detail 1 Member Demographics Fields

Definitions of the fields on a Detail 1 record, when each field is required, and instructions for reporting demographic changes. (Revised 12/2025)

Detail 2 Wage and Service Fields

Descriptions of the type of salary, lump-sum payoff, and contribution information to enter in each field of a Detail 2 record and whether it is required or optional. Includes section for local governments on using work period date fields. (Revised 05/2025)

Correct Usage of Subject and Non-Subject Salary Fields

Explanation of when to report wages in the Non-Subject Salary field of a Detail 2 record, demonstrated through 10 sample reporting situations. (Published 06/2025)

Choosing the Best Reporting Method

Checklists of what type of reports and records are best to use when reporting wages and hours, employment status, and demographic information. (Revised 05/2025)

Determining Qualification for a Partial Year

How to determine if less than a full year of work is qualifying or non-qualifying. (Revised 05/2025)

EDX Site Navigation Menu Items

Descriptions of all 14 functions on the EDX main menu and what they do (including two exclusively for web administrators). (Revised 06/2025)

Glossary

Definitions of terms used in PERS reporting. (Revised 12/2024)

Employer Service Center help and support

- Reach out for help
- Individual support
- Resources
- Employer education resources

ESC help and support

Reach out for help, if needed

Last but not least —

Please reach out for help

Phone numbers and email addresses are at:

www.oregon.gov/pers/emp/Pages/ESC-Representatives.aspx

ESC help and support

Individual support

Employer Service Center call center

Quick questions and employee status checks

General knowledge about EDX reporting

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

Phone
888-320-7377: press 4 to reach ESC

Email
PERS.EDX.Support@pers.oregon.gov

Fax
503-603-7626

ESC help and support
Individual support

Employer Service Center representatives one-on-one help

Individualized help with EDX reporting.

Can log into your EDX account to help solve issues.

Grouped into teams for specialized knowledge:

1. Local Government Employment
2. State Agencies
3. Schools, Oregon University System, and Community Colleges

Contact information listed on https://www.oregon.gov/pers/emp/Pages/ESC-Representatives.aspx

To reach your representative:

- Call between 8 a.m. – 4 p.m., Monday to Friday (excluding holidays).
- For a longer appointment, or 1-on-1 working session, email your rep. to schedule time.

1-on-1

ESC help and support

Resources

Detail 1 new-hire video

Reporting a New Employee

Submitting a Demographic Correction Request guide

Employer reporting guide 20, *Creating a DCR*

Questions and one-on-one help

Contact your Employer Service Center (ESC) account representative

Information about training

Email ESC employer trainer Rachel Schizas rachel.schizas@pers.oregon.gov

Webinar presentations, Q&As, and training materials webpage

PERS Employer Training webpage

ESC help and support
Employer education resources

- New Employer Reporter Welcome Guide
- PERS Member Journey illustration
- Thursday meet ’n greet (email the employer trainer)
- Live beginner employer training (scroll down to Instructor-Led Courses, live classes)
- Recorded beginner employer training (scroll down to Instructor-Led Courses, recorded class)
- Intermediate webinars w/Q&A (scroll to Upcoming Webinars)
- Previous webinars (in “Training Webinars” section)
- ESC Call Center
- ESC representatives one-on-one help (scroll to ESC Representatives)
- Monthly newsletter (delivered monthly by email then posted online)
- 28 employer reporting guides
- 11 quick-reference guides
- Employer website
- Videos (Training webpage, “Training Video Library” section)

Questions and answers

Questions and answers

- Raise your hand to speak (preferred) or ask in the chat.
- An ESC representative will answer your question, if possible. More complicated questions may need follow-up.
- Do not use employee names or any personal information.

OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

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THANK YOU