

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM

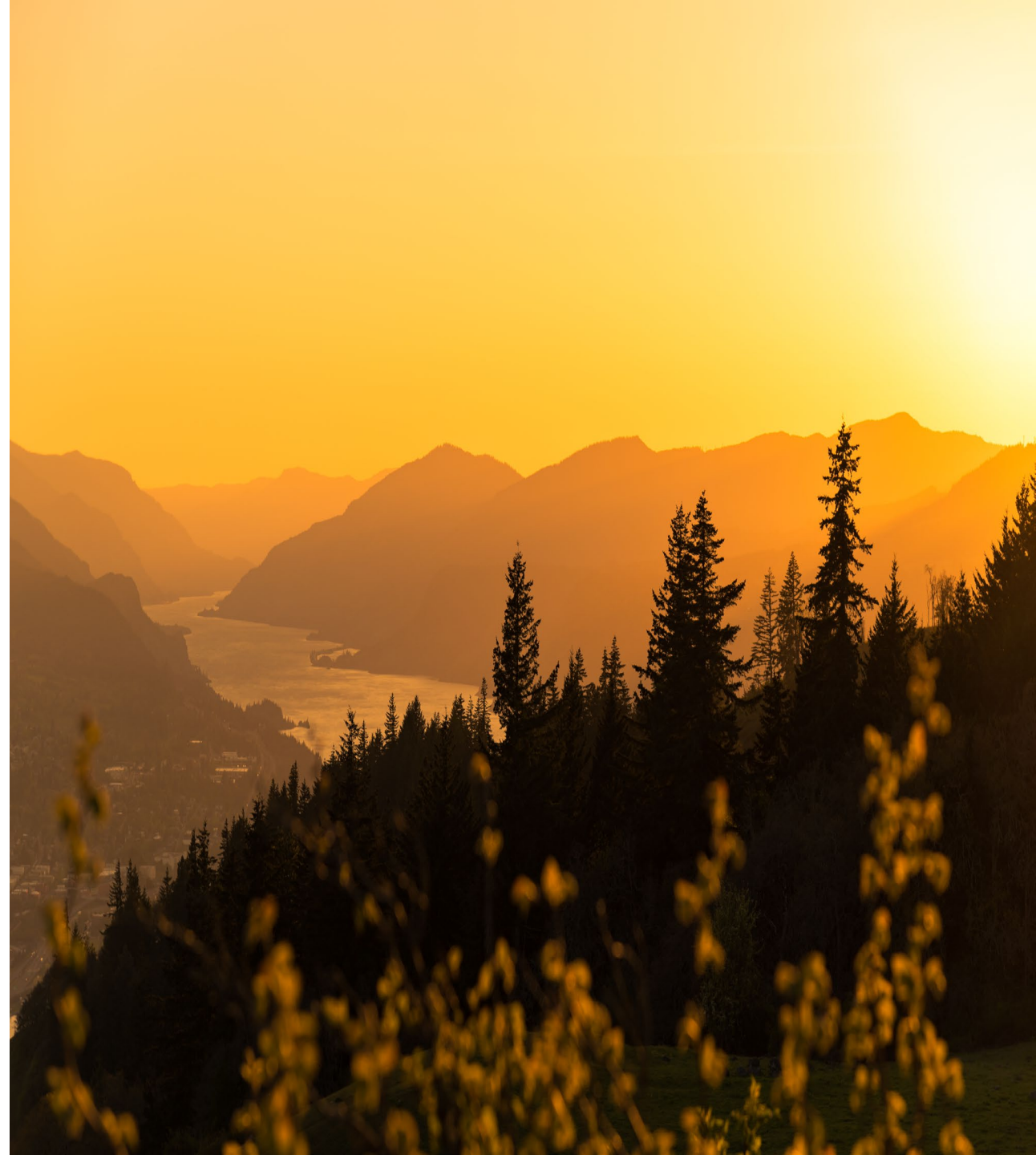


October 22, 2025

Preparing for year-end reconciliation

Rachel Schizas

Employer Service Center



Agenda

- Preparing for year-end
- Employer support
- Questions and answers

Preparing for year-end

- Year-end reconciliation checklist
- Get your reports posted
- Correct your suspended records
- Run reports
- Shoot for the star

Preparing for year-end

Year-end reconciliation checklist

All Regular reports for 2025 posted by March 5, 2026, deadline.



Inactive employees terminated.



Eligibility reports run (current and prior year).



Suspended records corrected and saved.



Preparing for year-end

Get your reports posted

Top **8** benefits
for your employer-
reporting team and
your bottom line.



Preparing for year-end

Correct your suspended records

What does “suspended” mean?

When you complete a report and release it, EDX checks it for errors during the overnight batch run.

If it finds an error or possible error, EDX “suspends” the report and does not post it nor process the data. Each record with an error has a message explaining the error.

ADD/EDIT A MEMBER RECORD

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



Error Messages For Member

S - Dates reported correspond to a Leave of Absence segment on file; only wage codes of 06, 08, 14 can be reported for Leave of Absence segments.

Preparing for year-end

Correct your suspended records

There are four types of error messages.

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>
B: Bad Format	<i>B - Date of Birth must be numeric.</i>
F: Flagged	<i>F - The Hours Worked (Regular) are greater than 200.</i>
VLID: Valid	There are several reasons why a record may be flagged as valid. Contact your account representative for help.

Preparing for year-end

Correct your suspended records

There are four options for addressing a suspended record.

Deletes entire report.

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Suspended	06/02/2022	06/04/2022	delete	edit	n/a	View Report	View Details	n/a
Suspended	09/07/2022	09/10/2022	delete	edit	n/a	View Report	View Details	n/a

Displays a Reject/Edit report of all suspended records in report with reason or reasons why each one was suspended.

Lists all suspended records in report. Choose this option to open each suspended record and fix errors. Best choice for correcting suspended records.

Displays status of every record in report and its status: posted (PSTD) or suspended (SUSP).

Learn more [Employer reporting guide 6, Correcting Suspended Records](#)

Preparing for year-end

Run reports

There are four types of EDX reports for checking membership status and voluntary contributions.

Report name	What it checks for
Inactive Employment	Employees for whom you haven't reported wages in at least the last three months but have not been terminated in EDX. Does not include working PERS retirees.
Employee Eligibility Exception	Employees whose eligibility to earn PERS benefits may have changed. Allows you to run eligibility reports going back two years.
Year-to-Date Wage and Contribution	Employee wages and contributions paid on those wages for a calendar year.
IAP Voluntary Contribution	Employees who have opted to make voluntary contributions: that is, contributions to their Individual Account Program (IAP) account to make up for the amount redirected to their Employee Pension Stability Account (EPSA) .
Instructions	Employer reporting guide 24, Running Reports.

Preparing for year-end

Run reports


Access reports through these Site Navigation menu items.

 View Year-to-Date Wage and Contribution Summary

 Eligibility Reports

 Inactive Employment Report


 View IAP Voluntary Contribution Report





TEST SITE


EMPLOYER DATA EXCHANGE


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

M

METROPOLIS
Employer Number: 02025

EDIT RETIREMENT DETAIL REPORTS

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 page.

Done

OPTION 2 - ADD OR EDIT A RECORD

You may add a new record or edit an existing record. Enter a Social Security Number in the form that appears on the following page.

SSN

Add or Edit Record

OPTION 3 - UNPOSTED RECORDS

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

10

Preparing for year-end

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](#).



Employer support

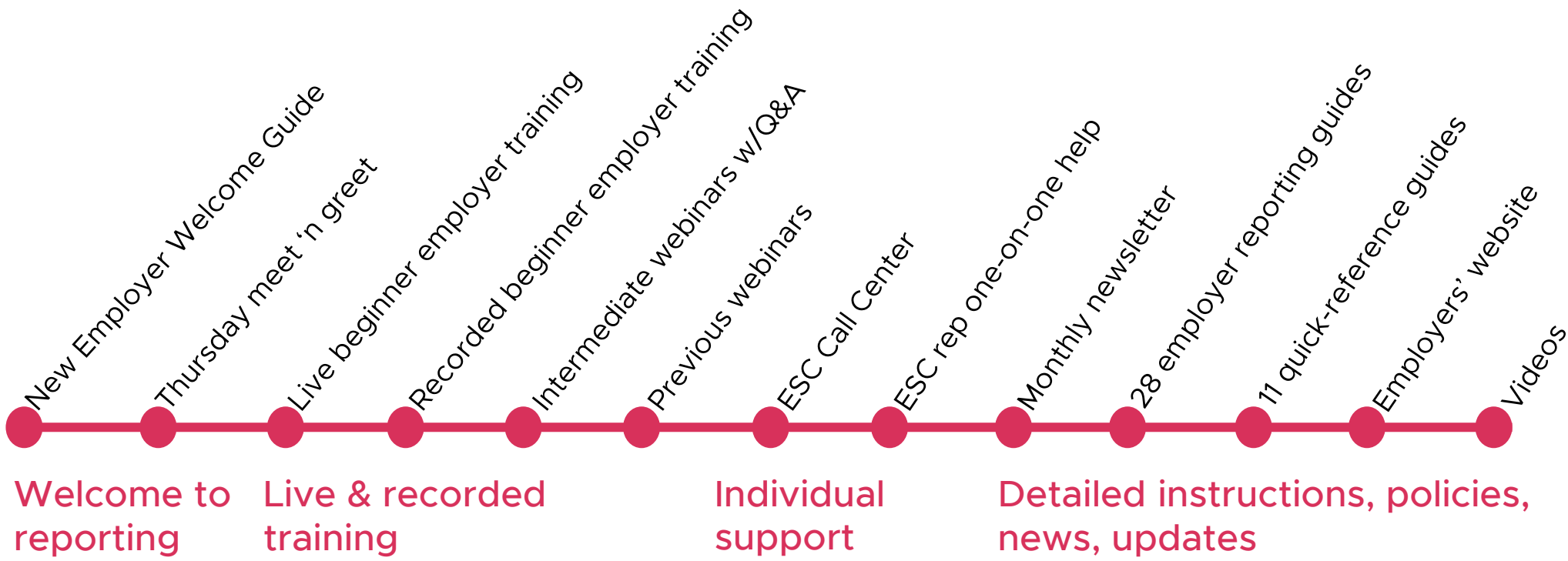
- Get informed
- Stay informed
- Help employees stay informed
- Employer Service Center

Employer support

Get informed

Learning options from beginner to advanced for all learning styles: one-on-one, group, and learn on your own. Learn by **reading** (manual and guides), **watching** (video), or **doing** (interactive, instructor-led class).

Links to all resources on last slide.



Employer support

Stay informed

PERS Employers website

From the [PERS homepage](#), click Employers or bookmark [Employers homepage](#).

Nonretired members

Online Member Services

[Tier One / Tier Two plans](#)

[Oregon Public Service Retirement Plan](#)

[What plan am I in?](#)

[Nonretired member newsletters](#)

Retirees

Online Member Services

[Work after retirement](#)

[Health insurance program](#)

[Tax information](#)

[Benefit payment information](#)

Employers

EDX Login

[EDX availability](#)

[Employer contribution rates](#)

[Monthly newsletter](#)

[Training](#)

(click)

quick
links

Employer support

Stay informed

PERS Employers website

- EDX instructions.
- Publications.
- Training.
- Videos.
- Financial information.
- Forms.
- Links to resources for employer reporters. See how to access them on next slide.

EDX support



[Using the EDX reporting system](#)
[Password reset](#)
[Requesting help](#)
[Automated data upload](#)

Help, guides, and resources



[Employer Service Center](#)
[Employer publications](#)
[Training](#)
[Employer Advisory Group](#)

Actuarial and financial



[Actuarial and financial resources](#)
[Contribution rates list](#)
[Governmental Accounting Standards Board \(GASB\) resources](#)
[Section 218 Social Security coverage](#)

Employer support

Stay informed

On Employers homepage

Resources for employer reporters

[Introduction to PERS reporting](#)

[New Employer Reporter Welcome Guide](#)

[Getting an EDX account](#)

[Learning how to use EDX](#)

Resources for new reporters

[EDX account troubleshooting](#)

[EDX automated data upload](#)

[EDX Regular report dates](#)

[EDX test environment instructions](#)

EDX support

[Reporting employee wages](#)

[Reporting leave without pay](#)

Overview of reporting wages in EDX

Decide whether to report time away as leave without pay (LWOP)

[Glossary of PERS terms](#)

[ESC representatives list](#)

[ESC training](#)

[Requesting help from Employer Service Center \(ESC\)](#)

ESC support

[Invoicing](#)

[Paying for PERS](#)

[Understanding your statement](#)

[Payment and reporting resources](#)

[Payment categories chart](#)

[ACH transfer dates](#)

[Signing up for or changing ACH](#)

How and when you are invoiced, paying your invoice, definitions of special charges, payments that are subject and non-subject salary

Employer support

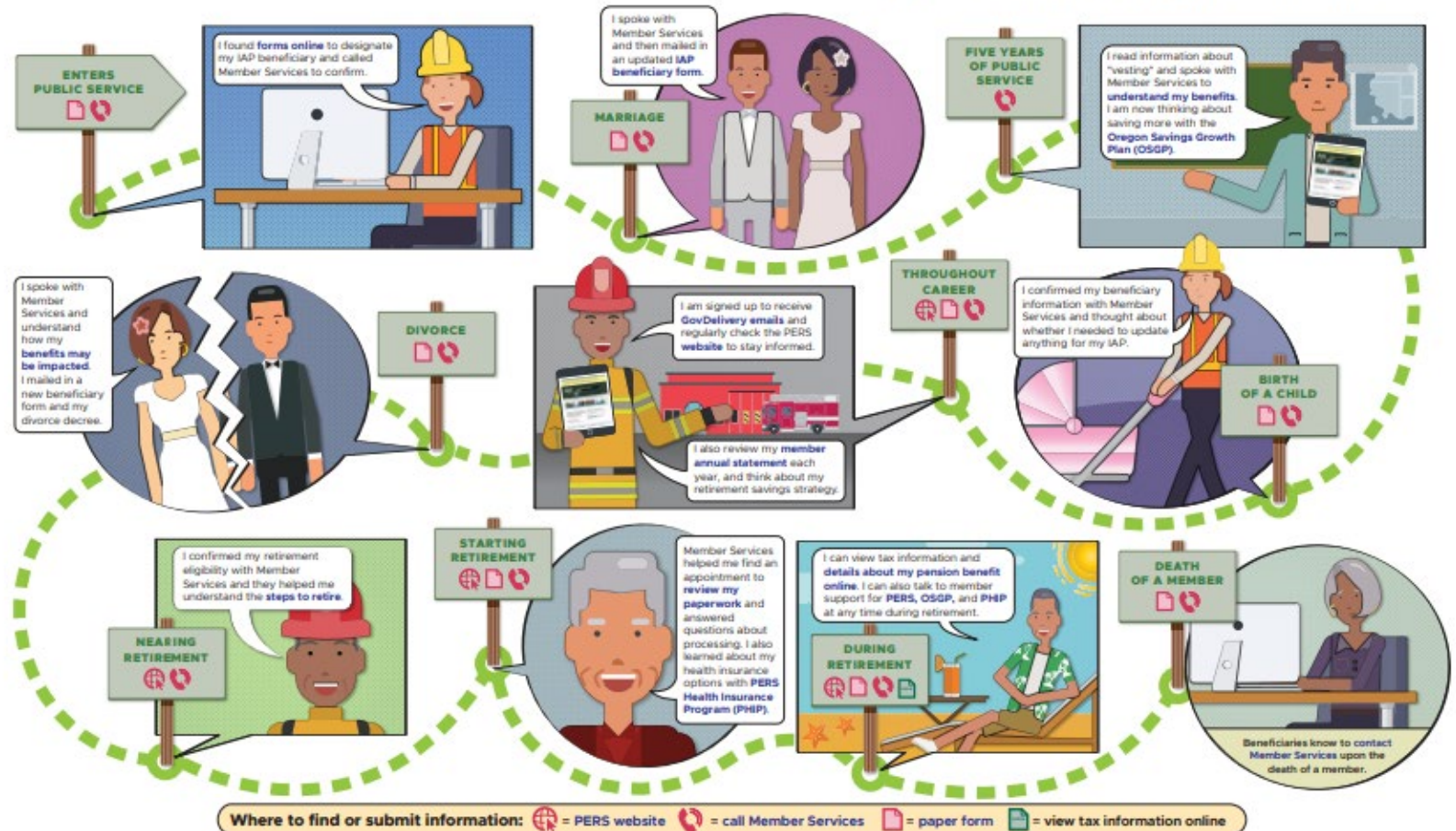
Help your employees stay informed

Member resources

- Member Services
Phone: 888-320-7377
(toll free)
Phone hours: 8:30 a.m. to 5 p.m., Monday through Friday
[Member Services Submit a Question form](#)
- [Member education sessions](#)
- [Welcome to PERS website](#) for new and future members

Click image to open it online

PERS Member Journey: Key moments in your career and life to engage with PERS



Employer support

Employer Service Center

About the Employer Service Center (ESC)

Specially trained experts are split into **three teams** based on employer type:

1. Local governments (such as cities, towns, counties, municipalities, and special districts).
2. State agencies.
3. Schools, universities, and community colleges.

Reps provide support and request information through:

- One-on-one calls.
- Demographic Correction Requests (DCR) in EDX.
- Work List requests in EDX.



Employer support

Employer Service Center

Demographic Correction Requests (DCR)

A DCR is an EDX form you use to request changes that only PERS can make, including:

- Start date
- Termination date
- Last day of service
- Job classification
- Position type
- Average overtime hours
- Contract number of months
- Hire intent
- Unused sick leave
- Contribution start date

You can also submit a DCR to inform ESC of employee status updates.

DCR

Instructions

[Employer reporting guide 20, Creating a DCR](#)

Employer support

Employer Service Center

Work List requests

When PERS needs information from you, we send an EDX Work List item. Items are like a to-do list. You need to address them as soon as possible. Work item types:

- Demographic Correction Request
- Disability employment status
- Data verification request
- IAP voluntary contribution
- Last day paid leave
- Salary breakdown
- Salary certification
- Termination
- Unused sick leave

Work List items can come from various sections of PERS, and a member's retirement benefit may be waiting on your response. *It is important to respond quickly.*

WORK LIST

Learn more

[Employer reporting guide 19, *Completing Work List Requests*](#)

Employer support

Employer Service Center

Employer Service Center Call Center

- Quick questions
- Status checks

Hours

8:30 a.m. – 12 p.m., M to F (excluding holidays)

Phone

888-320-7377; press 4 to reach ESC

Email

PERS.EDX.Support@pers.oregon.gov

Fax

503-603-7626



Employer support

Employer Service Center

Account representatives

Your account representative helps you:

- Conduct a status check on a new employee.
- Correct a suspended record.
- Report demographic, wage, and hour information.
- Make changes that only PERS is authorized to make.
- Answer questions, help with reporting challenges.

Hours

8:00 a.m. – 4:30 p.m., M to F (excluding holidays)

Phone and email

Select their team name on [ESC webpage](#)

1:1

Employer support

Links to 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](#) (scroll to Past Webinars)
- [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](#)
- [Employers website](#)
- [Videos](#) (scroll down to Videos)

Questions and answers

Questions and answers

Questions?

- 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



THANK YOU

