

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



All-Access Training Forum

April 30, 2025

Rachel Schizas
Employer Service Center



Agenda

- ESC training services and resources
- Welcome and new reporter program
- Live and recorded training
- Webinars
- Individual support
- Where to find detailed how-to instructions, policies, news, updates
- Questions and answers

Learning PERS

Employer Service Center training services and resources

Learning options from beginner to advanced for all learning styles:
One-on-one, group, and learn on your own.

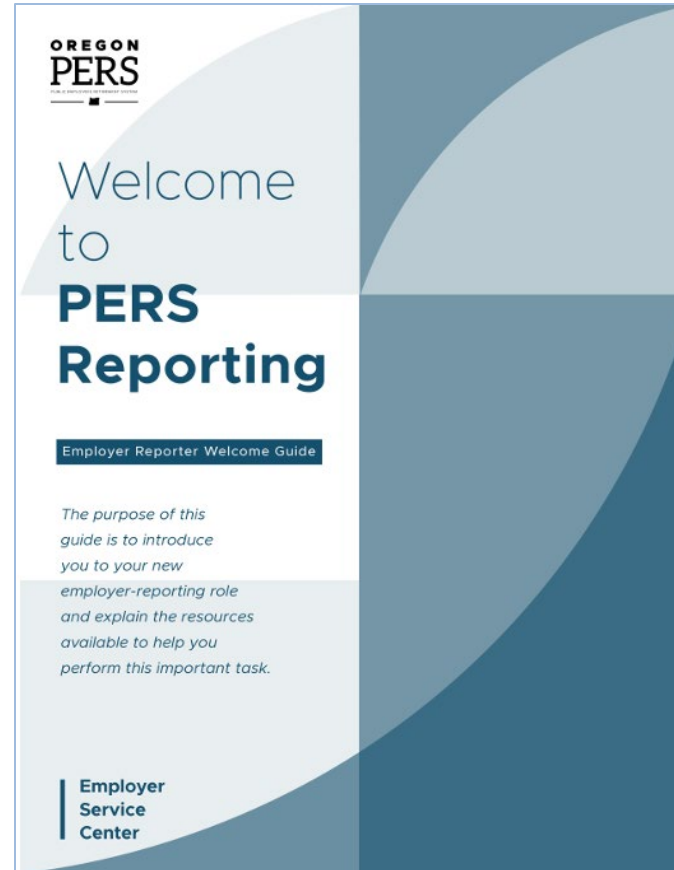


Learning PERS

Welcome and new reporter program

Welcome to PERS Reporting

- Welcome email and [Welcome to PERS Reporting guide](#).
- Sent to all new employer reporters and web administrators.
- Overviews employer-reporting role and resources available to help learn it.



Learning PERS

Welcome and new reporter program

New employer **meet 'n greet**

- Meeting for new employer reporters and web administrators.
- Most Thursdays, usually 8:30 a.m. – 10:00 a.m.
- Chance to connect right away without waiting 2–3 weeks for the beginner training.
- Initial touch base — NOT a training.
- 10 Quick Things to Remember
- Great time for questions; feel free to join more than once.
- Email rachel.schizas@pers.oregon.gov any week to join.

Learning PERS

Live and recorded training

How to find training:

Help, guides, and resources



From the Employers home page, under Help, Guides, and Resources, click Training.

<https://www.oregon.gov/pers/emp/Pages/Training.aspx>

[Employer Service Center](#)

[Employer publications](#)

[Training](#)

[Employer Advisory Group](#)

Learning PERS

Live and recorded training

Training webpage has links to access:

- Webinar materials.
- Registration for live training classes (next slide).
- Recordings of training classes.
- Training manuals for independent learning.
- Videos.



Training

The Employer Service Center provides webinars, training, videos, and one-on-one assistance for employer reporters.

Webinars

ESC Spring 2025 Webinar, Suspended Records March 26, 2025	Presentation slides 	Q&A
ESC Spring 2024 Webinar May 14, 2024	Presentation slides 	Q&A
ESC Winter quarter webinar February 15, 2024	Presentation slides 	Q&A
Paid Leave Oregon and PERS Reporting October 19, 2023	Presentation slides 	Leave without pay FAQ Paid Leave Oregon FAQ

Instructor-led courses



Course	Live classes	Recorded class	Topics covered	Training manual
Beginner Employer Reporting 1 Classes are held online from 8:30 to 11 a.m. on the second Wednesday of every month. (Smaller classes may end earlier.) Advance registration is required. Class size is limited to 30 students.	REGISTER FOR MAY 14 CLASS	Intro: Welcome Part 1: Employer Responsibilities and Roles Part 2: Creating Reports and Records Part 3: Special Considerations — Wait Time and Adjustment Records Part 4: Reporting Status Changes	Part 1: Introduction & Overview Overview of PERS The employer reporter role Getting started in EDX Working with reports	Beginner Training 1 manual 
			Part 2: Reporting Wages & Status Report a new hire Report wages Report wage changes Report a leave without pay (LWOP) Report a termination or death	Beginner Training 2 manual 

Learning PERS

Live and recorded training

Live instructor-led beginner course

Instructor-led courses



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Learning PERS

Live and recorded training

Recorded instructor-led beginner course

Instructor-led courses



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Learning PERS

Live and recorded training

Course manuals for reference and independent learning

Instructor-led courses

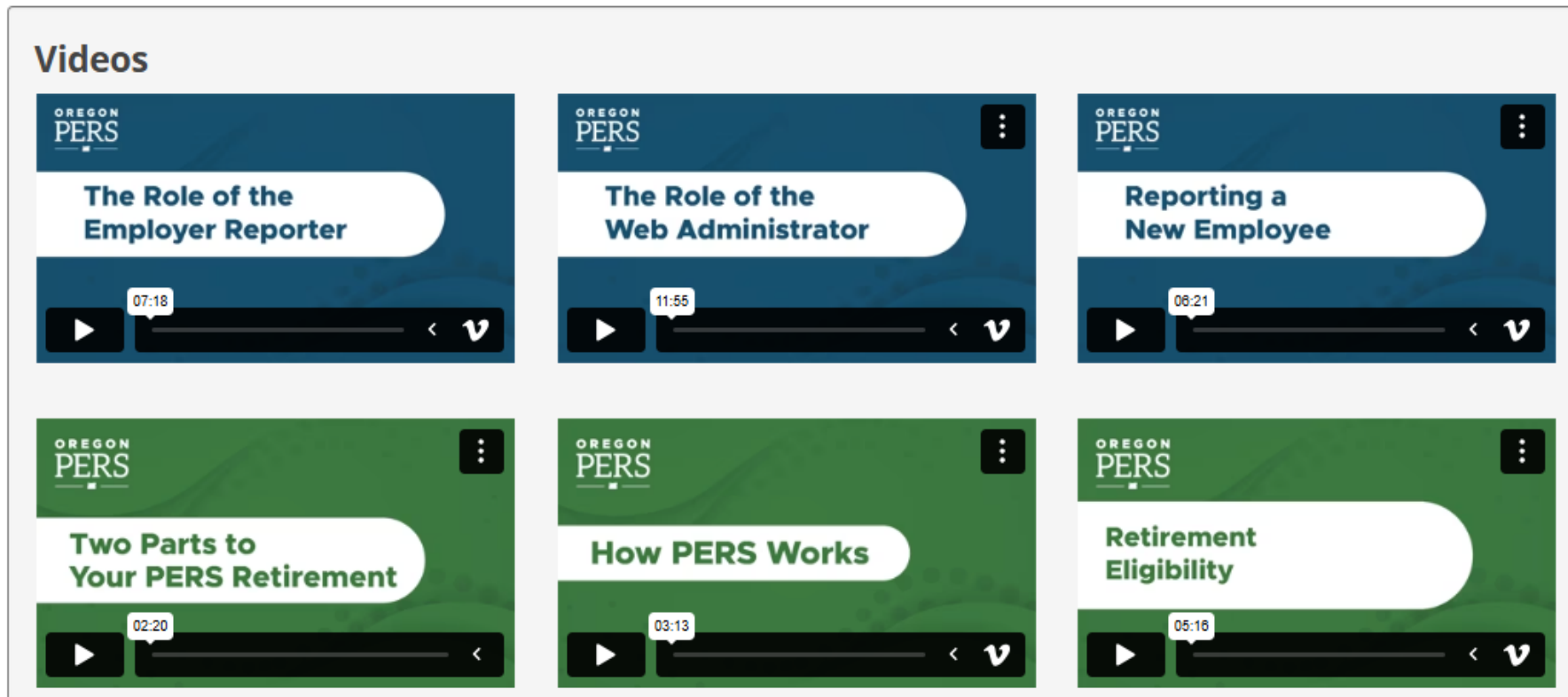
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Learning PERS

Live and recorded training

Employer videos

Found on the [Employers homepage](#) and on the [Training webpage](#). Videos for employers are blue, those for members are green. More videos are planned and coming soon!



Learning PERS Webinars

Upcoming webinars

- Announced by email (sent from GovDelivery email address).

EMPLOYERNEWS
bites

OREGON
PERS

April 28, 2025

You received this email because you are an employer contact or you signed up through GovDelivery for employer news and updates. Review your GovDelivery subscriptions [here](#).

Employer Service Center All-Access Training Forum

Are you aware of how many different resources we offer to help you learn the complex job of PERS reporting? Come find out at a special half-hour webinar this Wednesday.

When	Wednesday, April 30 9:30 a.m. to 10:00 a.m. Pacific Time
What	Presentation about the training, independent-learning, and support options ESC provides. We also want your feedback — what do you want to learn more about?
Where	Virtual meeting through Microsoft Teams (information below).

Learning PERS Webinars





Previous webinars

Past webinar slide decks and Q&A transcripts are posted on the [Training webpage](#).

Training

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Webinars

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Learning PERS

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 1, then 2 to reach ESC

Email

PERS.EDX.Support@pers.oregon.gov

Fax

503-603-7626



Learning PERS

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



Learning PERS

Detailed instructions, policies, news, and updates

How to find PERS publications

Help, guides, and resources



From the Employers home page, under Help, Guides, and Resources, click Employer publications.

<https://www.oregon.gov/pers/emp/Pages/Employer-Publications.aspx>

[Employer Service Center](#)

[Employer publications](#)

[Training](#)

[Employer Advisory Group](#)

Learning PERS

Detailed instructions, policies, news, and updates

How to find PERS publications

Employer publications

PERS provides newsletters, guides, and announcements to help employers stay updated on how to work with PERS.

Format: Some documents are published in .pdf format. To read them, you must have the most recent version of Adobe Reader®. [Download the latest version of Adobe Reader®.](#)

[Employer Newsletters](#)

[Employer Reporting Guides](#)

[Employer Announcements](#)

[UALRP Actuarial Guides](#)

Find current and archived newsletters, guides, and employer announcements.

Learning PERS

Detailed instructions, policies, news, and updates

Monthly *Employer News* newsletter

Emailed to employers' GovDelivery email list every month.

News, policy updates, EDX tips and tricks, and avoiding errors.

Examples of what you can learn by reading:

- All about retirement.
- How to hire a retiree (with less frustration).
- How to help school employees maximize service credit.
- Changes in rates, salary limit, member redirect threshold, retirement eligibility, laws, and more.

[Current and past issues posted online](#)



Learning PERS

Detailed instructions, policies, news, and updates

Employer reporting guides

- [Guides webpage](#)

Series of 28 guides
in PDF format

Employer Reporting Guides

Welcome to PERS reporting

1

[Overview of PERS](#)

Understand PERS' three retirement plans, obtaining and maintaining membership, retirement benefits, and options.

2

[Employer Requirements and Support](#)

About employer obligations, getting support, and staying informed.

Learning the basics

3

[Reporter Roles and EDX Access](#)

Responsibilities of web administrators and employer reporters in managing an employer's EDX account.

4

[Creating a Report](#)

How to report employee data to PERS with Regular reports and Demographics and Adjustment reports.

5

[Creating a Record](#)

How to report employee wages and demographics with Detail 1 - Member Demographics records and Detail 2 - Wage and Service records

6

[Correcting Suspended Records](#)

Errors that can cause record submissions to fail and how to fix the errors.

Hiring a new employee

7

[Reporting a New Employee](#)

How to report a new or returning employee.

8

[Hiring a PERS Retiree](#)

Guidelines, restrictions, and instructions for employing a PERS retiree.

Learning PERS

Detailed instructions, policies, news, and updates

Reporting wages and contributions

9

[Reporting Wages for a Qualifying Employee](#)

Example of how to report wages and hours for an individual employee.

10

[Reporting Wages for a Non-Qualifying Employee](#)

How to report wages and hours for an individual employee in a non-qualifying position. Includes instructions for changing employee to qualifying status.

Reporting status changes

11

[Reporting a Leave](#)

About different types of leave of absence and how to report them in EDX.

12

[Military Leave](#)

Guidelines for reporting time away from work for military duty and how to fulfill USERRA requirements.

13

[Family and Medical Leave](#)

Options and guidelines for placing your employee on a family or medical leave.

14

[Disability Benefits](#)

How PERS disability benefits work for Tier One/Tier Two members and Oregon Public Service Retirement Plan (OPSRP) members.

15

[Reporting a Termination or Death](#)

How to inform PERS that an employee has left your employment or died.

16

[Reporting a Retirement](#)

Information on retirement eligibility, helping employees prepare for retirement, and reporting a retirement.

17


[Calculating Unused Sick Leave Hours at Termination or Retirement](#)


How to calculate the number of unused sick leave hours to report for a Tier One or Tier Two employee.

Learning PERS


Detailed instructions, policies, news, and updates


Confirming and changing information


18
[Reporting or Changing "Average Overtime"](#) 
How to choose the value of average overtime hours on a new-hire record or DCR.

20
[Creating a Demographic Correction Request \(DCR\)](#) 
Instructions for completing a DCR.

22
Changing Employee Demographic Information
(In development)
How to change an employee's address, name, incorrect Social Security Number, or job class.

24
[Running Reports](#) 
About the five types of reports EDX can run, such as a list of employees eligible for contributions.

19
[Completing Work List Requests](#) 
How to address requests PERS sends through your Work List, including voluntary contributions, last day of paid leave, termination, and data verification.


21
[Viewing Employee Information](#) 
How to use this EDX function to find an employees' address, salary, or voluntary-contribution information.

23
Submitting an Adjustment Record (In development)
How to change wages reported for a prior reporting period.

25
Sending an Encrypted Message to PERS (In development)
How to use this EDX function to communicate with the Employer Service Center (ESC).

Being published soon!

Paying for PERS

26
[Understanding Your Statement](#) 
Explanations of the charges and credits listed in each section of your monthly statement.

27
[Paying Your Invoice](#) 
How to pay your invoice through Automated Clearing House (ACH).

Learning PERS

Detailed instructions, policies, news, and updates

Employer quick-reference guides Frequently needed lists and instructions

Employer Reporting Quick Reference Guides

[Wage Codes](#) 

Definitions of wage codes used on a Detail 2 Wage and Service record.

[Job Classification Codes](#) 

Definitions of PERS job classifications and descriptions of jobs that qualify for each job class.

[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.

[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.

[EDX Site Navigation Menu Items](#) 

A list of all the functions on the EDX main Site Navigation menu and what they allow you to do.

[Status Codes](#) 

Definitions of status codes used on a Detail 1 Member Demographics record.

[EDX File Format and Development Guide](#) 

Format specifications and requirements for uploading Detail 1 and Detail 2 record data files to EDX.

[Detail 2 Wage and Service Fields](#) 

Descriptions of the different salary, payoff, and contribution fields on a Detail 2 Wage and Service record.

[Determining Qualification for a Partial Year](#) 

How to determine if less than a full year of work is qualifying or non-qualifying.

[Glossary](#) 

Definitions of terms used in PERS reporting.

Dat file format for file upload to EDX

How to fill out a Detail 2 record

Qualification status when EE works less than full year

Definitions of EDX and PERS terms

How to fill out a Detail 1 record

When to use record vs. DCR

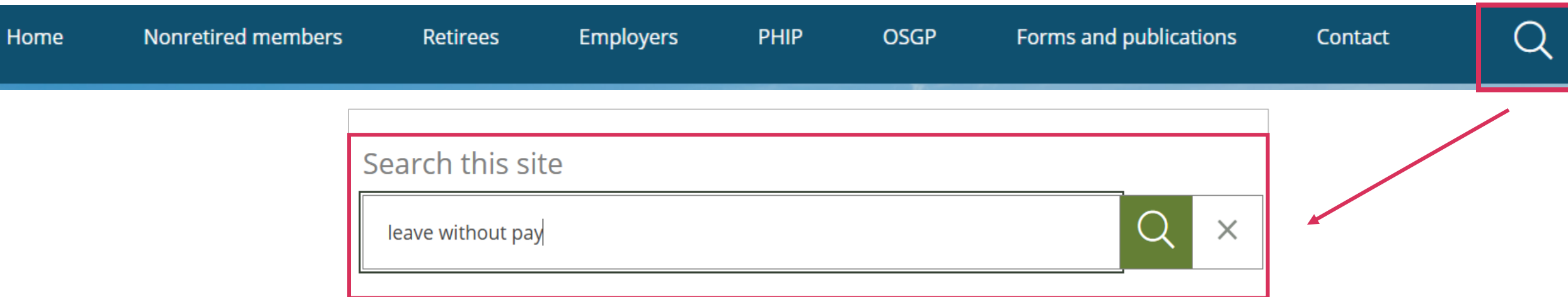
Explanations of all EDX functions

Learning PERS

Detailed instructions, policies, news, and updates

[Employers website](#)

- Every resource you need is on the website.
- Everything discussed in this presentation is accessed through the PERS Employers website.
- Can't find something? Use the MAGNIFYING GLASS to search.



The screenshot shows the top navigation bar of the PERS website. The bar is dark blue with white text for the following links: Home, Nonretired members, Retirees, Employers, PHIP, OSGP, Forms and publications, and Contact. On the far right of the bar is a magnifying glass icon inside a square box, which is highlighted with a red border. Below the navigation bar is a search box. The search box has a light gray background and contains the text "Search this site" in a small font. Below this text is a white input field with the text "leave without pay" and a cursor at the end. To the right of the input field are two buttons: a green button with a white magnifying glass icon and a white button with a gray 'X' icon. A red arrow points from the magnifying glass icon in the navigation bar to the search box.

Home Nonretired members Retirees Employers PHIP OSGP Forms and publications Contact

Search this site

leave without pay

Learning PERS

Detailed instructions, policies, news, updates

Overview of PERS for New Employees webpage

- [Link to webpage.](#)

PERS plans

PERS members are in one of three plans, depending on when they first became a PERS member. Read the [definitions of Tier One, Tier Two, and Oregon Public Service Retirement Plan \(OPSRP\) plans](#).

Judges are members of the [Judge Member Program](#).

PERS pension

[OPSRP overview](#): New employees who have never worked for a PERS-participating employer before are members of the OPSRP plan.

[Plan definitions](#): Continuing employees who have worked for a PERS-participating employer before might be in the Tier One, Tier Two, or OPSRP plan. If they aren't sure, go to the plan definitions page to determine what plan they are in.

PERS IAP


[What Is the IAP?](#): Overview for Tier One, Tier Two, and OPSRP members.

[Employee Pension Stability Account \(EPSA\) Overview](#): An explanation of your EPSA, into which a percentage of your IAP goes.

Member annual statement

Every year, all PERS members receive a statement of their retirement pension and account balances. To understand your statement, read [Member Annual Statement FAQs](#).

PERS member journey

This [infographic](#)  shows when members need to engage with PERS throughout their career.



Oregon Savings Growth Plan (OSGP)

[OSGP](#) (if your agency participates): Learn about this optional deferred-compensation savings plan, which is another option for employees to save more for retirement.

PERS Health Insurance Program (PHIP)

[PHIP](#) offers both Medicare and non-Medicare health plans to eligible PERS retirees, spouses, and dependents.

For new employees

- [Designating a beneficiary](#)
- [Electing a different IAP target-date fund](#) 
- [Forms for police, firefighters, and 911 telecommunicators](#)
- [Signing up for an Online Member Services account](#) 

Learning PERS

Detailed instructions, policies, news, and updates

Map of [Employers home page](#)

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](#)

- For those new to PERS and for HR to introduce new employees to PERS
- For employer reporters and web admins
- For finance and budgeting specialists

About PERS	+	Popular links	+
Resources for employer reporters	+	Education	+
Rates, budgeting, and financials	+	News and events	+
Forms	+	Frequently asked questions	+

- Training, guides, and overview of PERS benefits
- Events and conferences at which PERS reps will be presenting
- FAQs from past events, grouped by topic

Learning PERS

Leave feedback

If you have feedback, ideas, praise, or improvements for any of these resources at any time —



<https://www.oregon.gov/pers/emp/Pages/Employer-resource-feedback-form.aspx>

Learning PERS

Leave feedback

Most important survey of the year

- May 1–31.
- Check your email for the link.
- Need everyone to fill it out!
- It's quick!
- We use it to:
 - Measure PERS against similar pension plans.
 - Score employer satisfaction with service and resources we provide.
 - Gather feedback on what we're doing well, what we can improve.



Learning PERS

In development

Interactive learning modules

- My learning in Workday.
- Will have assigned login.
- An additional training option.

*(This is just an image,
video won't play)*



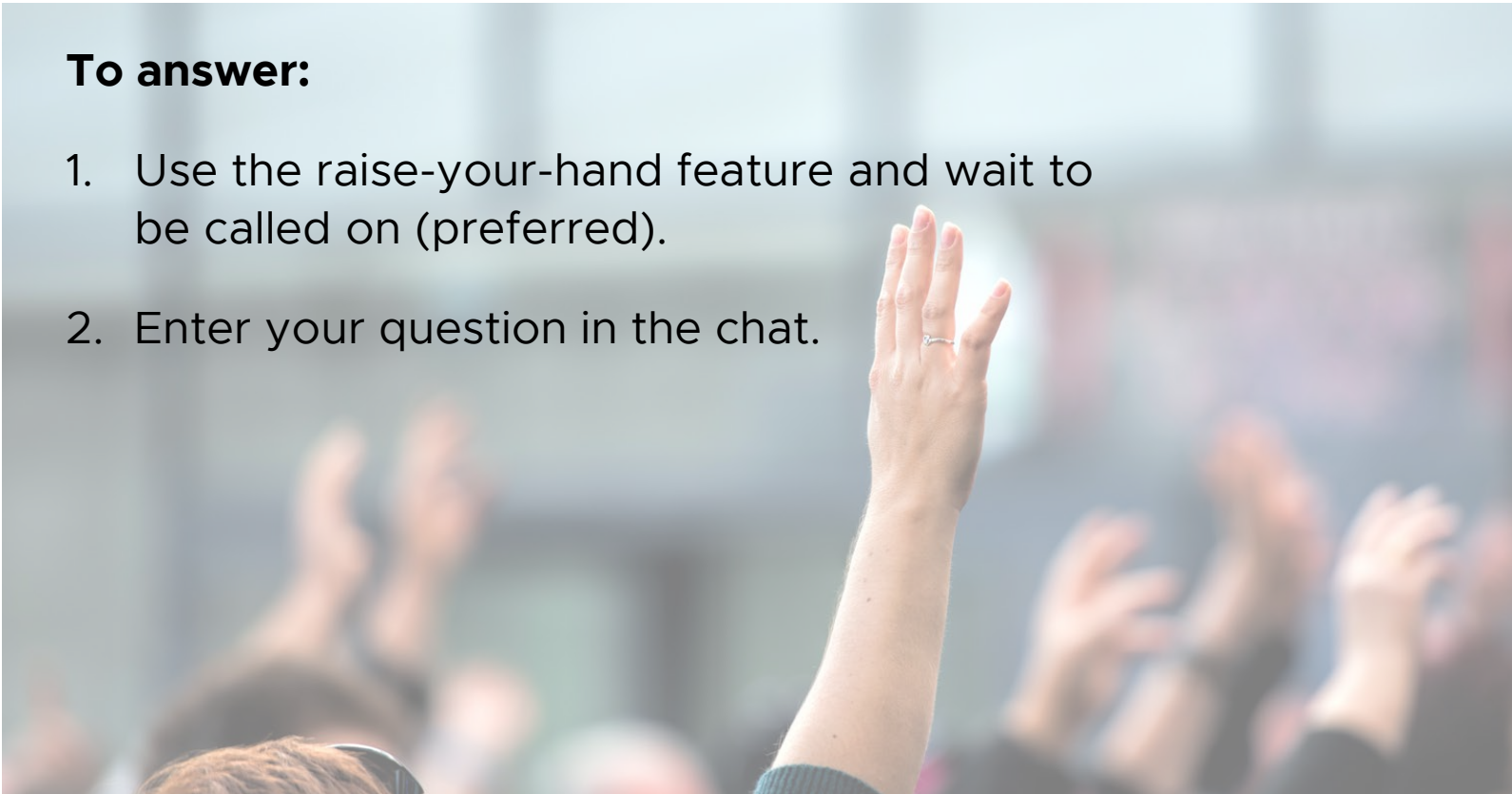
Now it's your turn

What do you need?

On what topics would you like more training or resources?

To answer:

1. Use the raise-your-hand feature and wait to be called on (preferred).
2. Enter your question in the chat.



Questions and answers

Q&A

How to ask a question

Two options:

1. Use the raise-your-hand feature and wait to be called on (preferred).
2. Enter your question in the chat.

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

Important: Do not use employee names or mention any personally identifiable information.



After the webinar:
Send questions to
your [ESC
representative or
call the ESC Call
Center.](#)

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Thank you

[Employer Service Center
contact information](#)

