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Join us at PERS/OSGP Expo'18 – October 11, 2018



Better TOGETHER.

**REGISTRATION OPEN!**

Whether you envision retirement spent in a hammock or filled with activity, you may want to plan for life's events and do some saving to ensure comfort in your retirement years.

The Public Employees Retirement System (PERS) and the Oregon Savings Growth Plan (OSGP) invite and encourage you to attend PERS/OSGP Expo'18 at the Salem Convention Center on Thursday, October 11.

Doors open at 9:30 a.m. There is [free parking](#) at and near the Expo.

If you are a public employee at the beginning of your career, getting ready to retire, or any place in between, Expo'18 will have retirement resources to guide you on your journey. Register and meet face-to-face with experts from:

- PERS,
- Oregon Savings Growth Plan,
- PERS Health Insurance Program (PHIP),
- Oregon College Savings Plan,
- Medicare,
- Social Security, and
- much more!

There will be fun, prize-winning learning activities that you're sure to enjoy!

While it is never too late to start saving and taking advantage of the many benefits of opening an [Oregon Savings Growth Plan](#) (OSGP) account, the earlier you start planning and saving for retirement, the more time your money has to compound and grow.

### Registering for sessions at Expo'18

This year, [registration](#) for the Expo is required for you and your guests. Once you have registered to attend the Expo, you will be prompted to begin registering for each session you plan to attend. To help make the most of your Expo experience, we have created suggested "Paths" based on your current career stage.

Each path has a suggested agenda for employees in their Early Career, Mid-Career, and Nearing Retirement. Look for these paths on the left side of the [registration website](#). They will help you consider what information sessions to attend.

## 2018 Employer Satisfaction Survey

Please take PERS' annual [employer satisfaction survey](#). Your feedback will help us improve the services we provide.

The survey will be live through August 31, 2018. <https://www.surveymonkey.com/r/PERSEmployer2018>

To print an agenda of your registrations, follow these four steps:

1. After you register for your final presentation, click the Save button.
2. Click on Register for another session.
3. Click the Back button.
4. Click on View appointments.



## Can't make it to Salem for the Expo?

PERS, OSGP, and PHIP education sessions are also offered throughout the year at various locations.

To view the schedule of upcoming sessions at a location near you, follow the links below:

[PERS Education Sessions](#)

[OSGP Workshops](#)

[PHIP New Enrollment Presentations](#)

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## EDX Work List Request

There are a number of work item types which may appear on your work list in EDX: Service Retiree or Disability Retiree, Salary Breakdown, Employment Confirmation, Termination Request, Unused Sick Leave, Demographic Correction Request, and Employer Data Verification Request. Please complete work list requests as quickly as possible; benefit calculation and benefit payments depend on form completion.

Please note: an Employer Data Verification Request must be completed within 30 days after the request receipt by an employer. If required, a one-time extension of that 30-day period must be requested within 21 days after request receipt.

### Work List

Below is a list of employees for which PERS is requesting information. The Work Item Type indicates the type of information that is required. Please complete and return each Work Item. Click on the SSN to enter salary information.

[Create Demographic Correction Request \(DCR\)](#)

[Learn more about working with Work List](#)

Click on the leftmost column to get the detail of the clicked record.



Plan	Year	Request Date	Work Item Type	Status
PERS-Tier 2		07/24/2018	Termination	New
PERS-Tier 2		07/13/2018	Termination	New
PERS-Tier 2		07/12/2018	Termination	New
PERS-Tier 1		07/12/2018	Termination	New
PERS-Tier 1		07/13/2018	Employer Data Verification Request	New
PERS-Tier 1		07/27/2018	Unused Sick Leave	New
PERS-Tier 2		07/26/2018	Unused Sick Leave	New
PERS-Tier 2		07/25/2018	Unused Sick Leave	New
PERS-Tier 1		07/25/2018	Unused Sick Leave	New
PERS-Tier 1		07/25/2018	Unused Sick Leave	New
PERS-Tier 2		07/25/2018	Unused Sick Leave	New
PERS-Tier 2	2000	07/20/2018	Salary Breakdown	New
PERS-Tier 1		07/17/2018	Demographic Correction Request	Returned

# PERS EMPLOYER NEWSLETTER AUGUST 2018

If you no longer have or are unable to locate archived employment and/or wage information for an employee, please communicate that information with PERS staff in the comments box within the work item request as soon as possible. Again, a benefit payment may be pending.

Month	Hours	Salary	Contribution Type	Contribution
January		\$		\$0
February		\$		\$0
March		\$		\$0
April		\$		\$0
May		\$		\$0
June		\$		\$0
July		\$		\$0
August		\$		\$0
September		\$		\$0
October		\$		\$0
November		\$		\$0
December		\$		\$0
TOTAL	0.00	\$0.00		\$0.00

## Reporting terminations

PERS-recommended best practice is to submit a DTL1 record with a 02-termination status code within 31 calendar days of the employer/employee relationship ending.

The DTL1 “last day service” can be before, the same as, but never after the termination date.

**Status Code:** What's happening with this individual, with you, the employer?

**Status Date:** What's the effective date of the status?

**Last Day Service:**

The “Last Day Service” and “Unused Sick Leave Hours” fields are filled in only when reporting a termination.

## Local government employers only:

Reporting terminations when final work period dates are already posted

When posting a termination, pay attention to reported work period dates in the last posted wage record. Your DTL1 record with a 02-termination status code will not post if your termination status date or Last Day Service is earlier than the posted Work Period End Date on your last posted wage record.

- Work Period End Date on final wage record must be on or before the:
  - Last Day Service on the DTL1 record with 02-termination status code, which must be on or before the:
    - Termination status date on the DTL1 record with 02-termination status code

Detail 1 - Member Demographics:

SSN:	112233445
Status Code:	02 - Terminated
Status Date: (MM/DD/YYYY)	06/30/2017
Last Day Service (MM/DD/YYYY)	06/29/2017
Old SSN:	
First Name:	Frank
Last Name:	Stein
Middle Name:	
Name Change Indicator:	N
Address - 1:	1234 SMITH ROAD
Address - 2:	
Address - 3:	
City:	PORTLAND
State:	OREGON
Zip - 1:	97123
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:	0
Contract No. of Months:	00
Employer Site Distribution Code:	
Non PERS Data Memo:	

Correct reporting:

- Last Posted Work Period End Date - 6/29/2017
- Last Day Service – 6/29/2017
- Termination Status Date – 6/30/2017

Save Cancel

## Detail 1 - Member Demographics:

SSN: 112233445

Status Code: 02 - Terminated

Status Date: (MM/DD/YYYY) 06/10/2017

Last Day Service (MM/DD/YYYY) 06/15/2017

Old SSN:

First Name: Frank

Last Name: Stein

Middle Name:

Name Change Indicator: N

Address - 1: 1234 SMITH ROAD

Address - 2:

Address - 3:

City: PORTLAND

State: OREGON

Zip - 1: 97123

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 0

Contract No. of Months 00

### Incorrect reporting:

- Last posted Work Period End Date – 6/30/2017
- Last Day Service – 6/15/2017
- Termination Status Date – 6/10/2017

INCORRECT

The suspension message for your termination will be:

“S-The member’s reported Last Day Service must be less than or equal to the Termination and/or Deceased date.”

For assistance please contact your ESC Account Representative:

<http://www.oregon.gov/pers/EMP/Pages/ESC-Representatives.aspx>