

- Senate Bill 1049 information
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# EMPLOYER NEWSLETTER

## Senate Bill 1049: Changes to Member Contributions and Amortization of Unfunded Actuarial Liability (UAL)

The Oregon Legislature has approved [Senate Bill 1049](#). While there are **no immediate member impacts upon passage, and the bill primarily impacts members who have not yet retired**, the bill does include a number of changes for PERS employers and members that will occur in the future.

[Read a statement from the PERS Director on the passage of Senate Bill 1049.](#)

PERS has created a [web page](#) containing information for PERS employers about this bill, as well as a [separate page](#) for members. Both include details on what groups will (or will not) be impacted and a timeline of possible implementation.

### PERS Employer Contribution Rates

PERS rates for 2019-2021, beginning July 1, 2019, are **not changed** by this bill.

The 2019 Actuarial Valuation, to be presented in fall 2020, will be used to set 2021-2023 rates. We expect employers to see the impact of Senate Bill 1049 on employer rates for the 2021-23 biennium.

### Next Steps

PERS will continue to analyze the bill and prepare for implementation, if approved by the Governor. We will add more information to our [SB 1049](#) and [Employer Rate Relief Programs](#) web pages in the near future.

[Sign up for GovDelivery updates to receive email or text alerts from PERS on Senate Bill 1049.](#)

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## Immediately return to PERS any completed Designation of Beneficiary forms

It is a member's responsibility to make sure PERS receives a Designation of Beneficiary form when he or she changes a beneficiary. However, at times members may give these forms to employers. If this happens, please immediately send PERS any completed Designation of Beneficiary forms you receive from an employee.

A valid change of beneficiary designation is not considered effective until PERS accepts the form.

Tier One/Tier Two members (hired before August 29, 2003) should complete both of the following:

- [IAP Pre-Retirement Designation of Beneficiary Packet](#); and
- [Tier One/Tier Two Pre-Retirement Beneficiary Designation](#) form.

OPSRP members (hired after August 28, 2003) should complete:

- [IAP Pre-Retirement Designation of Beneficiary Packet](#).

If a Tier One/Tier Two member does not have a valid Tier One/Tier Two Pre-Retirement Beneficiary Designation recorded with PERS, benefits will be distributed as required by statute.

IAP benefits for both OPSRP and Tier One/Tier Two members who have no valid IAP Pre-Retirement Designation of Beneficiary recorded with PERS will be distributed as required by statute.

There is no pre-retirement beneficiary form for an OPSRP pension benefit. An OPSRP Pension pre-retirement benefit would be paid:

- 1) only if the OPSRP member is vested in his/her pension account prior to retirement, **and**
- 2) only to a spouse or person constitutionally required to be treated as a spouse.

PERS regularly updates our forms, so please be sure you are using the latest version of the forms. Updated forms are available on the PERS website.

## EDX Work List requests

There are a number of work item types that 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 work list completion.

Please note: An Employer Data Verification Request must be completed within 30 days after request received 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

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

The screenshot shows the 'Salary Breakdown Request' form in the EDX system. The form includes a dropdown for 'Job Class' (set to 'SALARIED EMPLOYEE'), a 'Comments' field, and a table for monthly salary and contribution data. The 'Comments' field is circled in red, indicating where to enter information if archived data is unavailable.

Month	Hours	Salary	Contribution Type	Contribution
January				0.00
February				0.00
March				0.00
April				0.00
May				0.00
June				0.00
July				0.00
August				0.00
September				0.00
October				0.00
November				0.00
December				0.00
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.

**- 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

Employer Site Distribution Code

**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:** Last physical date the employee was on the job.

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 date of:
  - 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

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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

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  
Employer Site Distribution Code:

## Incorrect reporting:

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

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>