

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



EMPLOYER NEWS

NOVEMBER
2022

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SUPPORT

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Golden mantled ground squirrel

Announcing updated employer manuals

Employers can now begin using a new series of employer manuals called **Employer Reporting Guides** available on the [PERS Employer website](#).

Rather than updating the existing employer manuals, the Employer Service Center is combining the manuals into a series of short, individual guides. This will help you find exactly what you need to know to submit reports in Employer Data Exchange (EDX). The expanded information will also help you explain PERS benefits to your employees.

The first six employer reporting guides are [available now](#) for reading, printing, and downloading (see table below). They provide general information for EDX beginners and include

images from the new EDX design (learn more on page 3).

Guides 7–26 will cover detailed reporting topics such as part-time employees, new hires, retirement, leaves, and more.

The guides will eventually replace the existing employer manuals:

- *Employer Manual.*
- *EDX User Guide.*
- *EDX Reporting Quick Reference Guide.*
- *EDX File Format and Development Guide.*
- EDX User Quick Info (A-Z).
- Employer Help Files (A-Z).

In addition to the new guides and prior versions, [the webpage](#) includes links to the UALRP actuarial guides.

Employer reporting guides AVAILABLE NOW	Employer quick-reference guides AVAILABLE NOW
1 – Overview of PERS	EDX Status Codes
2 – Employer Roles and Responsibilities	EDX Wage Codes
3 – Getting Started in EDX	EDX Job Class Codes
4 – Creating a Report	Glossary
5 – Creating a Record	EDX Site Navigation Menu Items
6 – Correcting Suspended Records	Detail 2 Wage and Service Fields
	Choosing the Best Records and Reports
	Determining Qualification for a Partial Year

Put ‘pending benefit’ requests at top of your to-do list

When you receive an email from PERS with “pending benefit” in the subject line, make sure to respond as soon as possible. The email is a request for information that the PERS Member Adjustments team needs in order to do an estimate or to process your employee’s (or former employee’s) retirement or withdrawal benefit.

Examples of information requests include:

- Salary breakdown.
- Data verification.
- Termination date.
- Missing wages.
- Unused sick leave.



Example email subject line

PERS, ER1033, Ima Member, 123456, missing wages (pending benefit) (CJM)

Subject line breakdown

Subject line item	PERS	ER 1033	Ima Member	123456	Missing wages	Pending benefit	(CJM)
Definition	From PERS	Employer No.	Employee name	Employee PERS No.	Info needed	A retirement or withdrawal benefit is waiting on this information	Sender's initials

These emails come from PERS.Member.Adjustments@PERS.oregon.gov or PERS.DataVerification@PERS.oregon.gov.

Refreshed EDX design coming November 18

On November 18, 2022, Employer Data Exchange (EDX) is getting a fresh new design. The update will enable EDX to perform better on Chrome and FireFox browsers. This update necessitated updating the text styles, so the result is a new look.

The same menus, options, and functionality will still be available. However, some page layouts will be slightly different, as shown in the screen captures below and on the next page.

OREGON PERS **EMPLOYER DATA EXCHANGE** Log Off Contact Us

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 List](#)
- [Request Information](#)
- [Eligibility Reports](#)
- [Status Check](#)
- [Inactive Employment Report](#)
- [View IAP Voluntary Contribution Report](#)

BIG SCHOOL #1
Employer Number: 06000

Address: Employer information displays at top of home screen.
Phone: [Redacted]

Status: Active
Status Date: 07/01/1946
Reporting Frequency: Monthly

Show less Default Switch Employer

Click to view only icons.

Click star to make this employer your default.

Click to jump down to Tell Me More at bottom of screen.

If you report for more than one employer, click here to choose from pull-down list.

EMPLOYER HOME PAGE

ALERTS FROM PERS
You have no alerts.

YOUR CONTACTS
Employer reporters, web administrators, and other contacts who are authorized to discuss your account with PERS.

Contact Type	Contact Name	Contact Phone
Employer Reporting 14	[Redacted]	[Redacted]
Employer Reporting 15	[Redacted]	[Redacted]
Employer Reporting 4	[Redacted]	[Redacted]

Main menu now includes icons. Current function shown by ">".

Employer home screen

Continued

- > View Your Statement
- Work on Reports
- View Employee Info
- View Year-to-Date Wage and Contribution Summary
- Update My Profile
- Work List
- Request Information
- Eligibility Reports
- Status Check
- Inactive Employment Report
- View IAP Voluntary Contribution Report

VIEW EMPLOYER STATEMENT OR WAGE AND CONTRIBUTION REPORT

Tell Me More Statements and wage reports are on tabs listed horizontally. Hover over a tab and it highlights. Click the tab to open it.

This process allows you to view your organization's current Employer Statement, Unbilled activity since the last statement, history of your organization's Employer Statements, or history of your organization's Wage and Contribution Reports.

Current Contribution Rates
Employer Statement
Unbilled Activity
Employer Statement History
Wage and Contribution Report History

YOUR CURRENT CONTRIBUTION RATES

Your rate breakdown is the first tab. The section you're in is indicated by a blue underline.

Rate Category	Normal Cost Rate Percentage	Combined UAL Rate Percentage	Net Rate Percentage
PERS General Service	5.00%	5.00%	5.00%
PERS Police & Fire	5.00%	5.00%	5.00%
OPSRP General Service	5.00%	5.00%	5.00%
OPSRP Police & Fire	5.00%	5.00%	5.00%

View Your Statement screen

EMPLOYER DATA EXCHANGE

SITE NAVIGATION

- Employer Home
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- > View Year-to-Date Wage and Contribution Summary
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- Inactive Employment Report
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BS

BIG SCHOOL #1

Employer Number: 06000

YEAR-TO-DATE WAGE AND CONTRIBUTION SUMMARY

Year 2022
Today 09/15/2022

Search By SSN

To search for an employee by Social Security Number, type the number (no dashes) in the box and hit Enter or click Search.

1

Filter By Last Name

<click> To search for an employee by name, enter the name in the text box and then click outside the box. Do not hit Enter or click the Search button.

Year-to-Date Wage and Contribution Summary screen

Update your contacts in EDX

Your Employer Contacts list in EDX shows people in your organization who are authorized to discuss your account with PERS. It is important to keep this list updated to serve as a resource for PERS to reach stakeholders and to protect the security of your EDX account.

How to update contacts

Your organization's web administrator needs to select **Work with Contacts** from the EDX main menu. On the Employer Contacts screen, they can add and subtract people and update the address, phone number, fax number, and email of existing contacts. (The screen will look different when EDX is refreshed on November 18.) For help, contact your [ESC representative](#).

Current Employer Contacts screen

New Employer Contacts screen coming Nov. 18

Avoid suspended reports: check your part-time employees' hours

As the end of 2022 approaches, it's time to check your part-time employees' hours to ensure they are in line with their position type. If their reported hours and position type are not in line, you will receive an error message from EDX and your report won't post.

How to check employees' hours for calendar year to date

To find the hours to date that your part-time employees have worked for all their employers, use the **Eligibility Reports** function in EDX and run both types of reports. These reports help determine if corrective action is needed to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions (non-qualifying).

Continued

If corrective action is needed

If the **Members Approaching Qualifying Hours report** shows that an employee needs their position type switched from non-qualifying service (less than 600 hours/year) to active service (more than 600 hours/year), submit a Demographic Correction Request (DCR) requesting to have their position type changed.

If the **Members with Contributions Who may not Qualify** report shows that an employee needs their position type switched from active service to non-qualifying service, submit a DCR requesting to have their position type changed.

Invoicing



Once a position type is changed from non-qualifying service to active service, you may be invoiced for contributions on that employees' wages back to hire date, contribution start date, or beginning of the year.

Once a position type is changed from active service to non-qualifying service, you may be refunded for contributions that were not due for that calendar year.

Learn more

For complete instructions on how to check employees' hours and change their position type (if necessary), read [employer reporting guide 6, "Correcting Suspended Records."](#)

Actuarial news: Side accounts and liabilities/surpluses maturing for most employers in 2027

On December 31, 2027, the following accounts will mature:

- 181 side accounts.
- All pre-SLGRP liabilities/surpluses.
- Most transition liabilities/surpluses.

Currently, these rates can significantly modify employer net rates and the system funded status. As of the 12/31/2021 valuation:

- State and Local Government Rate Pool (SLGRP): pre-SLGRP surplus/liabilities, transition surplus/liabilities, and side accounts accounted for an average rate reduction of 8.91%.
- School Districts Pool: side accounts alone accounted for an average rate reduction of 10.77%.
- Independent employers: the average rate reduction of side accounts is 6.64%.

Tip:

Employers should consider now what steps they will want or need to take to balance the loss of these rate reductions and avoid major disruption.

Continued

Tune into Financial Modeling presentation next month

At the December 2 [PERS Board meeting](#), Milliman consulting actuaries will present their Financial Modeling forecast to the board. That presentation will include the estimated base pension rate increase over the next several biennia; employers may consider using these projections in their own budget projections when considering next steps.

Any employer can review the maturity date of their side account by reviewing the “Side Account Offset as of 7/1/2023” spreadsheet (on the [Actuarial Presentations and Reports webpage](#) under 2022). This spreadsheet has the side account rate and maturity date for each side account created on or before 12/1/2021.

About the Financial Modeling presentation

At the end of each year, following the publication of employer valuations, PERS’ consulting actuary Milliman Inc. presents a financial modeling update to the PERS Board. This presentation focuses on how current assumptions and projections will affect the unfunded actuarial liability (UAL), base and net rates, and funded status over a long period of time using the actuary’s variable-return financial modeling results.

The presentation helps you understand the factors that affect your contribution rate, including rate collar, assumed rate, system average rate, and net pension rate. You can use the information to improve your internal budgeting and forecasting results. It can also help you account for variability in your actuarial assumptions.

To learn more about Milliman’s financial modeling presentation, read [Guide to Financial Modeling](#).

Note: PERS’ current financial modeling is a 20-year projection based on expert assumptions about future economic conditions. The further out the results, the more subject they are to variability.

