

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



EMPLOYER NEWS

OCTOBER
2023

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Ginkgo leaves in autumn

For employer reporters

Make sure employees are still eligible (or not) for PERS this year

As we head into fall, it's time to check for employees whose eligibility for PERS benefits may change this year.

You can check for these employees by running two types of Eligibility Exception Reports:

- The **Members Approaching Qualifying Hours** report lists non-qualifying employees who may reach 600 hours this year with all employers and, thus, qualify for benefits.
- The **Members With Contributions Who May Not Qualify** report lists qualifying members who may not reach 600 hours with all employers this year and, thus, not qualify for benefits.

Position type change

A non-qualifying employee who has worked fewer than 600 hours for you this year can reach 600 hours or more if they work for other PERS employers.

If this happens, submit a DCR to request a change in position type from Non-Qualifying Service to Active Service.

If you have been paying contributions on an employee who does not qualify for benefits this year, PERS will refund you those payments. By the same token, if a non-qualifying employee ends up qualifying for benefits this year, PERS will invoice you for those contributions — both IAP and pension.

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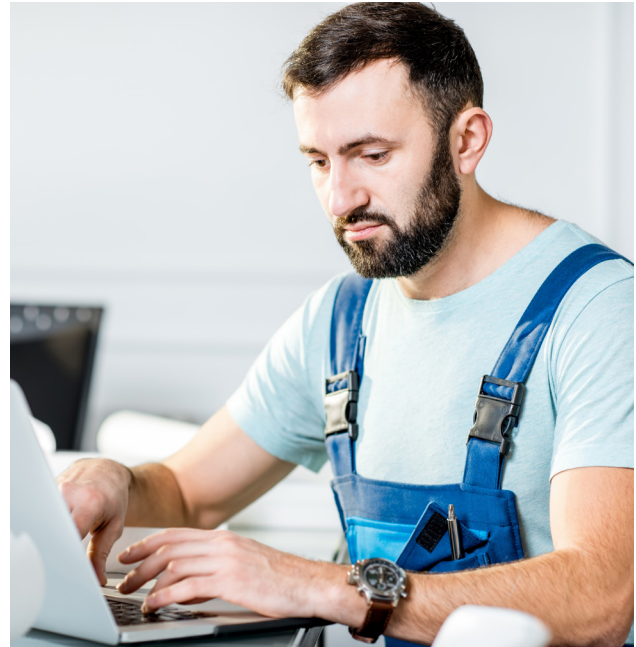
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If the reports reveal employees who need their position type changed to active service or non-qualifying service, submit a Demographic Change Request (DCR) asking PERS to make this change.

For instructions, read [employer reporting guide 24, Running Reports](#), “Eligibility Report” section.

Note about employees who don’t work the full year: Employees who won’t have a full year of work this year (because they were hired partway through the year or left before year-end or both) can still qualify for benefits if they are in a “qualifying” position. For more information, see employer quick-reference guide, “[Determining Qualification for a Partial Year](#).”

| | |
|------------|---|
| TIP | Remember to check eligibility for past years, if you haven’t already. EDX allows you to run eligibility reports going back two years (i.e., 2022 and 2021). |
|------------|---|



EMPLOYEE ELIGIBILITY EXCEPTION REPORTS

[? Tell Me More](#)

The reports below can be used to determine if corrective action is required to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions.

Please note that these reports are only updated once a week. When viewing the CSV file, the header row will state the date the information was pulled from the system.

Filter your report by year

Enter a year (YYYY)

Members Approaching Qualifying Hours

[Download CSV File](#)

Members with Contributions Who may not Qualify

[Download CSV File](#)



For employer reporters

Do you have ‘inactive’ employees?



In preparation for the end of the year, it’s time to check for inactive employees; that is, employees who are no longer working for you but have not been terminated in EDX.

To find inactive employees, run an **Inactive Employment Report**. This report generates a downloadable file that lists the last pay date, hire date, and contribution start date for employees who have had no wages reported in the last 90 days.

Note: The report does not include working PERS retirees.

For instructions, read [employer reporting guide 24, Running Reports](#), “Inactive Employment Report” section.

INACTIVE EMPLOYMENT REPORT

[? Tell Me More](#)

This report lists all employees who have open employment segments and appear to be inactive.

Inactive Employment Report

[Download CSV File](#)

*For employer reporters
and web administrators*

New employer reporting guides and videos



Employer reporting guides

9, Reporting Wages for a Full-Time (Qualifying) Employee. Instructions for reporting a full-time or “qualifying” employee’s wages to PERS.

11, Reporting a Leave. Explanations of different leaves of absence, when and how to report an employee’s leave, and how a leave without pay affects PERS benefits.

13, Family and Medical Leave. How and when to report family and medical leaves, options for receiving pay during a family or medical leave (including Paid Leave Oregon), and when and how to report pay.

20, Creating a Demographic Correction Request (DCR). Employee changes that require a DCR and instructions for creating one.

Unfunded Actuarial Liability (UAL) Resolution Program guide

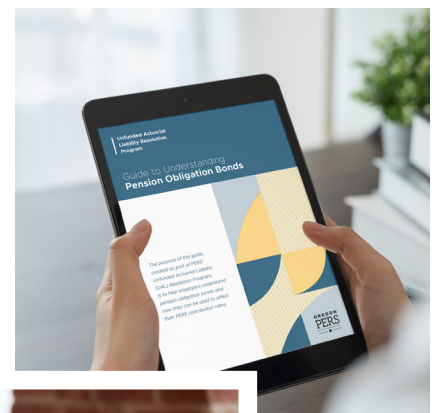
Guide to Understanding Pension Obligation Bonds. Explanation of what a pension obligation bond (POB) is, how employers can use it to help reduce their PERS net contribution rates, and risks and benefits of issuing one.

Videos

“Reporting a New Employee.” This video demonstrates how to report a new hire to PERS.

“Responsibilities of a Web Administrator.” This video shows the duties performed by a web administrator.

You can find these videos on the [Employer Training webpage](#).



For PERS members

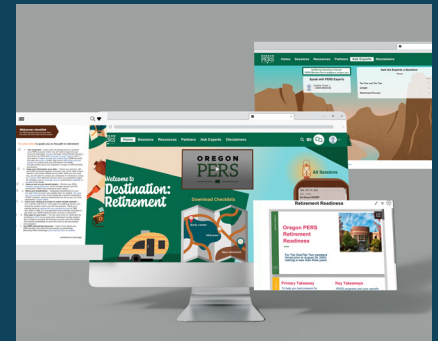
It's time for PERS Expo



PERS Expo 2023 kicks off on October 10 at 8 a.m. Pacific. Join in for live, moderated, and on-demand content from PERS, Oregon Savings Growth Plan, the PERS Health Insurance Program, and other retirement and public-service-oriented resources. The event repeats on October 11, so you do not need to attend both days.

The [PERS Expo](#) offers checklists, videos, question-and-answer sessions, and other digital resources to help PERS members:

- [Identify the PERS plan](#) they're in — Tier One, Tier Two, or OPSRP.
- Understand the two parts to their PERS retirement — the pension and the Individual Account Program (IAP), including the Employee Pension Stability Account (EPSA).
- Explore their options for saving more for retirement with [Oregon Savings Growth Plan](#).
- Learn about the PERS retirement-application process.
- Check out post-retirement health insurance coverage through the [PERS Health Insurance Program](#).
- Learn about Medicare through the [Senior Health Insurance Benefits Assistance \(SHIBA\)](#) program.



To attend the expo, go to the [PERS Expo website](#) on the 10th or 11th and sign in or register (if you haven't already).

