



EDX File Format and Development Guide

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Version 2.4

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Introduction

Purpose

This guide serves as a technical reference for the Employer Data Exchange (EDX) version 2 file format structure and provides specifications to use in creating the data files you upload into EDX. **Note:** It is limited to report data file creation and physical format.

Important: If you are responsible for file creation, you also need to be familiar with specific EDX reporting requirements to understand the timing of report submission and how to populate data fields in different situations. Section 4 in the *EDX User Guide* and the Appendix in the *Employer Manual* cover these topics in detail, respectively.

Audience

Users who create and format data files employers upload as reports into EDX will find this manual helpful in understanding the formatting parameters. Employers with more than 250 employees are required to use the File Upload method; smaller employers may also upload report data, if they desire. The target audience includes:

- internal software developers,
- third-party payroll software providers, and
- payroll specialists.

Contacting PERS

If you have questions not answered in this manual, contact:

- MERS (Membership and Employer Relations Section) Employer Service Center toll free at 888-320-7377 or 503-603-7788, or
- email us at employer.support@pers.state.or.us.

File Basics

Overview

General

An EDX report data file is a standard ASCII text file containing multiple records expressed as data rows in fixed lengths. The number and types of records that should be included in the file will depend on the type of report and number of reportable events employers need to submit. Each row must contain appropriate field data based on the record type and the nature of activity employers report.

Report types

There are two basic report types employers can submit using EDX:

- **Regular Report:** This is the required, regularly scheduled report that must include wage and service (DTL2) records for employee payments made in the reporting period or adjustments to previously posted activity. You can also submit demographic (DTL1) records in Regular Reports. Each report must have a unique report date that PERS assigned according to your organization's reporting frequency.
- **Demographics and Adjustment Report:** This report is for reporting demographic information and payroll adjustments to previous reporting periods. Demographics and Adjustment Reports can contain demographic (DTL1) records with any status code and only wage and service (DTL2) records with these wage codes: 04, 05, 06, 14, or 16. You can assign Demographics and Adjustment Reports any report date **other than** those reserved for regular reports.

Record types

All report data files must contain three basic record types:

- Header (It must be the first record in the file.)
- Detail (The record must be below the header and above the footer.)
- Footer (It must be the last record in the file.)

Header and footer records provide information about the overall report such as the identity of the organization reporting, report date, and the number of detail records contained in the report.

Detail records provide the details of demographic changes and employee payments. Use a Detail 1 record (also called a demographic or DTL1 record) to report hires, terminations, leave events, death, or changes to an employee's name, SSN, or mailing address; use a Detail 2 record (also called a wage and service or DTL2 record) to report employee payments, associated member contributions, and job class changes.

The requirements for when to submit and what values to include in DTL1 and DTL2 records are the same regardless of whether you upload the report as a data file or create it

manually. Refer to Section 4 in the *EDX User Guide* on when to report employee demographics and wages. Appendix C and D in the *Employer Manual* illustrates how to populate detail records.

Naming standard

All report data files must adhere to the following naming convention:

Organization #.Report Date.dat

The organization number must be the four-digit PERS employer ID for the organization, preceded by a zero. For example, a file with a report date of 01/15/2004 for employer number 1234 would look like this:

01234.01152004.dat

If you fail to follow this naming convention, you will get EDX errors when you attempt to upload the file.

Important: The report date used in the filename and the report creation date specified during the report upload process in EDX must be identical.

Note: PERS can neither provide .dat creation tools nor assist with modification or enhancement of your existing third-party tools.

Additional file format considerations

- Each record, regardless of type, must have a fixed length of 450 positions.
- Each record field has a specified number of positions that must be filled. If the data is not long enough to fill the number of positions in each field, add preceding zeros to numeric fields; add blank spaces to the end of alphanumeric fields.
- Numeric fields may only contain numeric characters.
- All dates must be in the format *MMDDYYYY*.
- Create all reports using the file format specified in this guide.

Record Field Descriptions

Data fields by record type

The tables listed in this section provide descriptions of the data fields contained in each record type (Header, DTL1, DTL2, Footer). The field descriptions are grouped in each table according to functionality and not field placement within the .dat file. Within each group, however, the descriptions are listed in the order in which the fields they describe appear relative to the other fields within the group. To locate the placement of each field in the .dat file, refer to the next section.

Header record

Field name	Description
Record Type Identifier	Identifies the record type. The header record should have “HEAD” in this field.
PERS Employer Number	Five-digit field containing the four-digit employer number PERS assigns, preceded by a zero.
Employer Name	Name of the reporting organization.
Report Date	Date given to a report at the time of creation, which uniquely identifies it. For Regular Reports, this is the date associated with the reporting frequency PERS assigns. For Demographics and Adjustment Reports, this may be any date other than dates reserved for regular reports.
Date Created	File creation date. It should be in the format <i>MMDDYYYY</i> .
Service Center Code	Five-digit code of the service center that prepared the file, if applicable.
Service Center Name	Name of the service center that prepared the file, if applicable.
Format Version Code	Specifies the format version submitted in the file at load time to verify that the correct format is being submitted: “1” or blank for the old format, “2” for the new format.
Filler	Filler to make the total record length 450 characters.

Demographic (DTL1) record

	Field name	Description
	Record Type Identifier	Identifies the record type. A demographic record should have "DTL1" in this field.
	PERS Employer Number	Five-digit field containing the four-digit employer number PERS assigns, preceded by a zero.
Member section	SSN	Employee's current Social Security number. In cases where a change in SSN is being reported, use this field for the new SSN.
	Old SSN	In cases where a change in SSN is being reported, this will be the old, incorrect SSN. A value in this field tells EDX the SSN is being changed.
	Last Name	Employee's last name.
	First Name	Employee's first name.
	Middle Name	Employee's middle name or initial.
	Name Change Indicator	Type "Y" if the employee's name has changed or "N" if the employee's name has not changed.
	Date of Birth	Employee's date of birth. The date must be in the format <i>MMDDYYYY</i> .
	Gender	Gender of the employee: "M" for male, "F" for female.
Address section	Address – 1	First line of the employee's address.
	Address – 2	Second line of a employee's address.
	Address – 3	Third line of a employee's address.
	City	City in which the employee resides.
	State	State in which the employee resides.
	Zip – 1	Five-digit ZIP code for the employee's address.
	Zip – 2	Four-digit ZIP code extension.
	Province	Province in which the employee resides. Note: Enter a value only if Country Code is not "USA."
	Country Code	Code for the country in which the employee resides.
	Postal Code	Postal code for the country in which the employee resides. Note: Enter a value only if Country Code is not "USA."

Demographic (DTL1) record (*continued*)

	Field name	Description
Employment section	Status Code*	Type of work status change being reported (hire, termination, death, starting or returning from leave). Use code 00 when changing only personal information (name, address, or SSN).
	Status Date	Date the work status change became effective. It must be in the format <i>MMDDYYYY</i> . Required with status codes other than 00.
	PERS Job Class Code*	Job class code under which a person is hired. Required only if you inputted 01 or 13 for the status code.
	Average Overtime Hours Code*	If PERS Job Class Code has a value in it, input the code for the number of annual overtime hours considered average/reasonable for the employee's new job class. This code provides a reasonableness cap on how many overtime hours are used for calculating a retiree's final average salary.
	Unused Sick Leave	Number of accumulated sick leave hours. Only enter a value when using status code 02 or 10.
	Contract No. of Months	Number of actual months the employee is contracted to work, regardless of how paid. Required only if you inputted 09 for the job class code. Values are restricted to the following: 00, 09, 10, 11, and 12.
	Last Day Service	Date work was last performed or the last date of paid leave (such as vacation, sick leave, comp time, etc.), whichever is later. The date cannot be later than the termination date. It must be in the format <i>MM/DD/YYYY</i> . Required when using status code 02 or 10.
Miscellaneous section	Employer Site Distribution Code	Optional field you can use to sort members' annual statements. (Example: For a large employer who has employees at five different work sites, use an employer site distribution code of "A" for the employees at site A, "B" for the employees at site B, etc.)
	Non PERS Data Memo	Field you can use to make notes about the record.
	Filler	Filler to make the total record length 450 characters.

* Indicates selection fields that can only be populated with one of a defined set of possible values. See Appendix for a complete list of possible values. Blanks may be appropriate in some fields.

Wage and service (DTL2) record

	Field Name	Description
	Record Type Identifier	Identifies the record type. A wage and service record should have “DTL2” in this field.
	PERS Employer Number	A five-digit field containing the four-digit number PERS assigns the employer, preceded by a zero.
Employee section	SSN	Employee’s Social Security number.
	Last Name	Employee’s last name.
	First Name	Employee’s first name.
Hours section	Pay Date	Date the employer paid the employee. The date inputted in the Pay Date field cannot be earlier than the date inputted in the Work Period Begin Date field. It must be in the format <i>MMDDYYYY</i> .
	Hours Worked (Regular)	Total hours a member worked that are not overtime.
	Hours Worked (Overtime)	Total hours a member worked that are attributable to overtime.
	Work Period Begin Date	Work Period Begin Date and Work Period End Date fields are used to allocate wages to the periods in which they were earned. The hours and salary need to be allocated to pay periods and along month boundaries. This field must contain a date if the value in the PERS Job Class Code or Average Overtime Hours field changes or the employer is a local government. The date must be in the format <i>MMDDYYYY</i> . The date inputted in the Work Period Begin Date field cannot precede the employee’s start date for the current job segment.
	Work Period End Date	Work Period Begin Date and Work Period End Date fields are used to allocate wages to the periods they were earned. The hours and salary need to be allocated to pay periods and along month boundaries. This field must contain a date if the value in the PERS Job Class Code or Average Overtime Hours field changes or the employer is a local government. The date must be in the format <i>MMDDYYYY</i> . The date inputted in the Work Period End Date field cannot be later than a date previously reported in the Last Date Worked field.

Wage and service (DTL2) record (*continued*)

	Field name	Description
Wages section	Reported Wage Code*	This code tells EDX how to treat the reported wage and contribution amounts. Typically this is 01 – Regular Wages. Other codes identify retroactive payments, adjustments, retiree wages, and other special situations.
	Subject Salary, Regular	Salary, excluding overtime pay and amounts expressly considered non-subject to PERS contributions, paid to the employee on the given pay date. <i>Payment Categories - PERS and OPSRP Contributions as of April 6, 2006</i> (available on the PERS Employer website) lists example payment types and identifies their treatment.
	Subject Salary, Overtime	Salary, excluding regular pay and amounts expressly considered non-subject to PERS contributions, paid to the employee on the given pay date for hours above the regular Subject Salary, Regular.
	Gross Salary	Gross salary paid on the given pay date. This field must equal the sum of the values inputted in: <ul style="list-style-type: none"> • Subject Salary, Regular, • Subject Salary, Overtime, • Non-Subject Salary, • Lump-Sum Payoff, and • Lump-Sum Vacation Payoff.
	Non-Subject Salary	Salary excluded from PERS and OPSRP contributions, e.g., a check issued for expense reimbursement. <i>Payment Categories - PERS and OPSRP Contributions as of April 6, 2006</i> (available on the PERS Employer website) lists example payment types and identifies their treatment.
	Lump-sum Payoff	Lump-sum payments made to the employee for various reasons such as accrued compensatory time, severance pay for involuntary termination (except retirement severance), or bonuses (except retirement bonus). <i>Payment Categories - PERS and OPSRP Contributions as of April 6, 2006</i> (available on the PERS Employer website) provides a more complete list of lump-sum payment types and how to report them.

Wage and service (DTL2) record (*continued*)

	Field name	Description
Wages section (cont.)	PERS Job Class Code*	<p>If the employee has changed his or her job class, update the code in this field. Only provide a value in this field if an active employee is changing from one job class to another.</p> <p>A change in this field also requires typing a value in the Average Overtime Hours field. The Work Period Begin Date and Work Period End Date fields also must contain a date when this field contains a value.</p>
	Average Overtime Hours Code*	<p>If PERS Job Class Code has a value in it, input the code for the number of annual overtime hours considered average/reasonable for the employee's new job class. This code provides a reasonableness cap on how many overtime hours are used for calculating a retiree's final average salary.</p> <p>A change in this field also requires selecting a value in the PERS Job Class Code field. The Work Period Begin Date and Work Period End Date fields also must contain a date when this field contains a value.</p>
	Lump-sum Vacation Payoff	<p>Lump-sum vacation payoff payments are made to the employee for accrued vacation and accrued paid leave only.</p> <p><i>Payment Categories - PERS and OPSRP Contributions as of April 6, 2006</i> (available on the PERS Employer website under Employer Tools) lists example payment types and identifies their treatment.</p>
Contributions section	Member Paid After-Tax Contribution (MPAT)	<p>IAP contributions paid by the employee, which, if entered, must equal 6 percent of total subject salaries.</p> <p>Type the member IAP contribution in this field if it is deducted from the employee's pay on an after-tax basis.</p>
	Member Paid Pre-Tax Contribution (MPPT)	<p>IAP contributions paid by the employee, which, if entered, must equal 6 percent of total subject salaries.</p> <p>Type the member IAP contribution in this field if it is deducted from the employee's pay on a pre-tax basis.</p>
	Unit Contribution	<p>Voluntary member contributions made by police-class or firefighter-class employees who submit a unit election under ORS 238.440.</p>
	Employer Paid Pre-Tax Contribution (EPPT)	<p>IAP contributions paid by employers, which, if entered, must equal 6 percent of subject salaries.</p>

Wage and service (DTL2) record (*continued*)

	Field name	Description
Contributions section	Optional Employer IAP Percentage	HB2020 included a new provision for employers to make an optional contribution to member IAP accounts in addition to required member contributions. However, ORS 238A.340(1) requires employers to submit a written agreement or employment policy to PERS before optional matching IAP contributions can be made. The contribution may not be less than 1 percent or more than 6 percent of the total subject salary.
	Optional Employer IAP Contribution	Dollar amount of optional IAP contributions indicated by the percentage listed in the field above.
Miscellaneous section	Employer Site Distribution Code	Optional field (up to 15 characters in length) you can use to sort employee information by division or geographic location. (Example: For a large employer with employees at five different work sites, use an employer site distribution code of “A” for the employees at site A, “B” for the employees at site B, etc.)
	Non PERS Data Memo	Field you can use to make notes about the record.
	Filler	Filler to make the total record length 450 characters.

* Indicates selection fields that can hold one of a defined set of possible values. See Appendix for a complete list of possible codes/values.

Footer record

Field name	Description
Record Type Identifier	Identifies the record type. A footer record should have “FOOT” in this field.
PERS Employer Number	Five-digit field containing the four-digit number PERS assigns the employer, preceded by a zero.
Employer Name	Field containing the name of the reporting organization.
Total Detail Records	Total number of detail records (DTL1 + DTL2) reported in the file. Exclude the header and footer records in determining this number.
Filler	Filler to make the total record length 450 characters.

File Format Specifics by Record Type

Overview

The following tables provide data specifications for each field in each record type. Failure to adhere to these specifications will cause errors when loading report files and “bad format” record validation errors.

You must:

- enter values in the correct record position,
- enter zeros for numeric fields and spaces for alphanumeric fields if the field is to be blank,
- enter preceding zeros if a numeric field is not long enough to fill the entire field position,
- make sure that each row in the file has exactly 450 characters, followed by a line return, and
- add spaces to the end of an alphanumeric field that is not long enough to fill the entire field position.

Format codes

X = Alphanumeric

9 = Numeric

v = Decimal point (Do not include decimal points in the file. This only indicates where the decimal place is located.)

File formatting

Important: The date entered into the Report Date field of the header record must match the report date in the .dat filename. (See “Naming standard” on page 3 on how to recognize the date in the filename). If the dates do not match, EDX will not allow the report to upload.

Header record format

Field Name	Data Type	Length	Position	Format
Record Type Identifier – HEAD	X(4)	4	1–4	4 positions
PERS Employer Number	X(5)	5	5–9	5 positions
Employer Name	X(30)	30	10–39	30 positions
Report Date	9(8)	8	40–47	MMDDYYYY
Date Created	9(8)	8	48–55	MMDDYYYY
Service Center Code	X(5)	5	56–60	5 positions
Service Center Name	X(30)	30	61–90	30 positions

Header record format (*continued*)

Field Name	Data Type	Length	Position	Format
Format Version Code	X(1)	1	91-91	1 position
Filler	X(359)	359	92-450	359 positions

Record Type Identifier	Pers Employer Number	Employer Name	Report Date	Date Created	Service Center Code	Service Center Name							
HEAD	01061	PERS _____	08232004	08232004	03551	ADP _____							
1	4	5	9	10	39	40	47	48	55	56	60	61	90

Format Version Code	Filler
2	_____
91	91
92	_____
	450

Shaded areas represents the beginning and ending field positions.

Figure 3-1. Header record example

Demographic (DTL1) record format

Field Name	Data Type	Length	Position	Format
Record Type Identifier – DTL1	X(4)	4	1-4	4 positions
PERS Employer Number	X(5)	5	5-9	5 positions
SSN	9(9)	9	10-18	999999999
Old SSN	9(9)	9	19-27	999999999
Last Name	X(30)	30	28-57	30 positions
First Name	X(20)	20	58-77	20 positions
Middle Name	X(20)	20	78-97	20 positions
Name Change Indicator	X(1)	1	98-98	1 position
Date of Birth	9(8)	8	99-106	MMDDYYYY
Gender	X(1)	1	107-107	1 position
Address – 1	X(30)	30	108-137	30 positions
Address – 2	X(30)	30	138-167	30 positions

Demographic (DTL1) record format (*continued*)

Field Name	Data Type	Length	Position	Format
Address – 3	X(30)	30	168–197	30 positions
City	X(28)	28	198–225	28 positions
State	X(2)	2	226–227	2 positions
Zip – 1	X(5)	5	228–232	5 positions
Zip – 2	X(4)	4	233–236	4 positions
Province	X(20)	20	237–256	20 position
Country Code	X(3)	3	257–259	3 positions
Postal Code	X(7)	7	260–266	7 positions
Status Code	X(2)	2	267–268	2 positions
Status Date	9(8)	8	269–276	MMDDYYYY
Not used	X(8)	8	277–284	8 positions
PERS Job Class Code	X(2)	2	285–286	2 positions
Not used	X(3)	3	287–289	3 positions
Average Overtime Hours Code	X(2)	2	290–291	2 positions
Unused Sick Leave Hours	9(4)v99	6	292–297	999999
Contract No. of Months	9(2)	2	298–299	2 positions
Employer Site Distribution Code	X(15)	15	300–314	15 positions
Non PERS Data Memo	X(40)	40	315–354	40 positions
Last Day Service	9(8)	8	355–362	MMDDYYYY
Filler	X(88)	88	363–450	88 positions

Scenario: John Bales, an Information Systems Analyst, was hired March 1, 2004, as a new employee.

Record Type Identifier	Pers Employer Number	SSN	Old SSN	Last Name	First Name	Middle Name							
DTL1	01061	111111111	000000000	Bales	John	Albert							
1	4	5	9	10	18	19	27	28	57	58	77	78	97

Name Change Indicator	Date of Birth	Gender	Address - 1	Address - 2	Address - 3						
N	01111957	M	24 Edmonds Rd.								
98	98	99	106	107	107	108	137	138	167	168	197

City	State	Zip - 1	Zip - 2	Province	Country Code	Postal Code	Status Code								
Tigard	OR	97224	0385		USA		01								
198	225	226	227	228	232	233	236	237	256	257	259	260	266	267	268

Status Date	Not used	PERS Job Class Code	Not used	Average Overtime Hours	Code	Unused Sick Leave Hours	Contract No. of Months	Employer Site Distribution Code							
03012004		01	200	00	000000	00	A								
269	276	277	284	285	286	287	89	290	291	292	297	298	299	300	314

Non PERS Data Memo	Last Day Service	Filler			
Limited Duration	00000000				
315	354	355	362	363	450

Figure 3–2. Demographic (DTL1) record example

Wage and Service (DTL2) record format

Field Name	Data Type	Length	Position	Format
Record Type Identifier – DTL2	X(4)	4	1–4	4 positions
PERS Employer Number	X(5)	5	5–9	5 positions
SSN	9(9)	9	10–18	999999999
Last Name	X(30)	30	19–48	30 positions
First Name	X(20)	20	49–68	20 positions
Pay Date	9(8)	8	69–76	MMDDYYYY

Wage and Service (DTL2) record format (*continued*)

Field Name	Data Type	Length	Position	Format
Hours Worked (Regular)	9(4)v99	6	77–82	999999
Hours Worked (Overtime)	9(4)v99	6	83–88	999999
Reported Wage Code	9(2)	2	89–90	99
Subject Salary, Regular	9(7)v99	9	91–99	999999999
Subject Salary, Overtime	9(7)v99	9	100–108	999999999
Gross Salary	9(7)v99	9	109–117	999999999
Non-Subject Salary	9(7)v99	9	118–126	999999999
Lump-sum Payoff	9(7)v99	9	127–135	999999999
Member Paid After-Tax Contribution (MPAT)	9(7)v99	9	136–144	999999999
Member Paid Pre-Tax Contribution (MPPT)	9(7)v99	9	145–153	999999999
Unit Contribution	9(7)v99	9	154–162	999999999
Employer Paid Pre-Tax Contribution (EPPT)	9(7)v99	9	163–171	999999999
Optional Employer IAP Percentage	9(1)	1	172–172	9
Optional Employer IAP Contribution	9(7)v99	9	173–181	999999999
PERS Job Class Code	X(2)	2	182–183	2 positions
Not used	X(3)	3	184–186	3 positions
Average Overtime Hours Code	X(2)	2	187–188	2 positions
Not used	X(8)	8	189–196	8 positions
Employer Site Distribution Code	X(15)	15	197–211	15 positions
Non PERS Data Memo	X(40)	40	212–251	40 positions
Work Period Begin Date	9(8)	8	252–259	MMDDYYYY
Work Period End Date	9(8)	8	260–267	MMDDYYYY
Lump-sum Vacation Payoff	9(7)v99	9	268–276	999999999
Filler	X(174)	174	277–450	174 positions

Scenario: Employer 01061 makes a regular payment of wages to John Bales on September 20, 2004. John has not changed job class. He worked 23 regular hours and 1.5 overtime hours in the pay period, earning regular wages of \$280.16 and overtime wages of \$27.41. John has passed his waiting-time requirement, so his wages are eligible for member (OPSRP IAP) contributions equaling 6 percent of total subject wages, or \$18.45.

Record Type Identifier	Pers Employer Number	SSN	Last Name	First Name	Pay Date	Hours Worked (Regular)							
DTL2	01061	111111111	Bales	John	09202004	002300							
1	4	5	9	10	18	19	48	49	68	69	76	77	82

Hours Worked (Overtime)	Reported Wage Code	Subject Salary, Regular	Subject Salary, Overtime	Gross Salary	Non-Subject Salary	Lump-sum Payoff	Member Paid After-Tax Contribution								
000150	01	000028016	000002741	000030757	000000000	000000000	000000000								
83	88	89	90	91	99	100	108	109	117	118	126	127	135	136	144

Member Paid Pre-Tax Contribution	Unit Contribution	Employer Paid Pre-Tax Contribution	Optional Employer IAP Percentage for IAP	Optional Employer IAP Contribution	PERS Job Class Code	Not used	Average Overtime Hours Code								
000000000	000000000	000001845	0	000000000											
145	153	154	162	163	171	172	172	173	181	182	183	184	186	187	188

Not used	Employer Site Distribution Code	Non PERS Data Memo	Work Period Begin Date	Work Period End Date	Lump-sum Vacation Payoff	Filler							
	A	Limited Duration			000000000								
189	196	197	211	212	251	252	259	260	267	268	276	277	450

Shaded areas represents the beginning and ending field positions.

Figure 3–3. Wage and Service (DTL2) record example

Footer record format

Field Name	Data Type	Length	Position	Format
Record Type Identifier – FOOT	X(4)	4	1-4	4 positions
PERS Employer Number	X(5)	5	5-9	5 positions
Employer Name	X(30)	30	10-39	30 positions
Total Detail Records	9(8)	8	40-47	99999999
Filler	X(403)	403	48-450	403 positions

Record Type Identifier	Pers Employer Number	Employer Name	Total Detail Records	Filler
FOOT	01061	PERS _____	00000113	_____
1	4	5 9	10 39	40 47 48 450

Shaded areas represents the beginning and ending field positions.

Figure 3–4. Footer record example

Appendix

Selection field values

This section describes the field code values used when entering data into a Detail 1—Demographic record or Detail 2—Wage and Service record.

Reported Wage Code

Used in Wage and Service records (DTL2), the reported wage code tells the system how to interpret the information on the wage and service record. The possible values are listed below.

Codes	Description	When used
01	Regular Wages	Used to report that an employee has received regular wages.
02	Regular/Non-Qualifying	Used to report subject salary wages for employees past their six-month waiting period whom the employer determines will not qualify for contributions in the current plan period.
04	Retroactive Payment	Used to report that an employee has received a payment that is actually applicable to a prior pay period and meets the statutory definition of retroactive payment. Report each affected pay date in a separate record.
05	Positive Adjustment	Used to report a positive adjustment to amounts reported for a previous pay date for an employee. Values entered will be added to the amounts previously reported for the pay date. The pay date entered must represent a previously reported pay date.
06	Negative Adjustment	Used to report a negative adjustment to amounts reported for a previous pay date for an employee. Values entered will be subtracted from the amounts previously reported for the pay date. The pay date must represent a previously reported pay date. (Note: Do not input a negative sign.) Reverses a record where wage code 01, 04, 05, or 08 was used.
07	Retired / No Contributions	Used to report a retired member who is returning to work.
08	Contributions/No Service	Used to report employees who are not working but are receiving wages over the summer months.

Codes	Description	When used
11	USERRA Qualifying Wages	Wages the employee would have received had he or she not served on military duty. (The employer does not actually pay wages to the employee for the USERRA period.)
14	Negative Adjustment/No Contributions	Used to report a negative adjustment to a previous pay period for an employee whose wages were previously reported without contributions (02 or 07). Only wage and service fields requiring adjustments should be reported. The fields that are reported will be subtracted from the previously reported amounts.
16	Negative Adjustment - USERRA Wages	Used to negatively adjust USERRA wages.

Status Code (DTL1)

The status code tells EDX how to treat the demographic information reported in terms of the change in employee status. Status codes inform the retirement system of your employees' current status. When you use accurate status codes, PERS will not need to contact you to determine when an employee was on leave, terminated, etc.

Codes	Description	When used
00	No Change in Status	Used when reporting a change to an employee's name, address, or SSN information. The employee's work status has not changed, however, the employee's name, address, or SSN has changed. Type "00000000" (for data files) or leave blank (for manually created records) for the status date when using this code.
01	New Hire	Used if the employee is a new hire. The status date should be recorded as the first day of work.
02	Terminated	This code should be used for employees terminated, retired, and laid off. The status date should be recorded as the last day the employer/member relationship was in effect.
03	On Family Leave	Used if the employee is on family leave. The status date should be recorded as the day the employee went on leave.

Codes	Description	When used
04	On Career Development Leave	Used if the employee is on leave for career development. The status date should be recorded as the day the employee went on leave.
05	On Military Leave	Used if the employee is on leave for military duty. The status date should be recorded as the day the employee went on leave.
06	On Legislator Leave	Used if the employee is on leave for legislative duty. The status date should be recorded as the day the employee went on leave.
07	On Leave of Absence	Used if the employee is on leave without pay. The status date should be recorded as the day the employee went on leave.
08	Return from Leave	Used if the employee has returned from leave. The status date should be recorded as the day the employee returned to work.
09	Seasonal Leave of Absence	Used to report a leave in which the employer-member relationship is not severed, but the person is not actively working. (For example, a seasonal employee leaves with the intention of returning.)
10	Deceased	Used to report a death.
11	Retiree New Hire with Hr Limit	Used to report the reemployment of a retiree under an hour limit.
12	Retiree New Hire w/o Hr Limit	Used to report the reemployment of a retiree with no hour limit.
13	New Hire - Retiree Return to Service	Used to report the reemployment of a retiree who returns to active service.
14	Notice of Unit Election	This code is currently not used . It is reserved for future use.
15	Non-Qualifying Hire	Used to report an employee who is not expected to work 600 hours or more in a calendar year.

PERS Job Class Code (DTL1 and DTL2)

PERS job class codes are extremely important because they determine which benefit structure applies to a member. Use this code in the Demographic (DTL1) record when using status code 01 or 13. In a Wage and Service (DTL2) record, use this code when an active employee changes job class.

Code	Description
01	General Service
02	Police and Fire
04	TIAA/CREF
05	Judge Member
06	Legislator
07	TRFA (Teachers Retirement Fund Association)
08	Elected Official
09	School Employee

Average Overtime Hours Code

Use this code for the number of annual overtime hours considered average for the employee's new job class. The average overtime hours code places a cap on how many overtime hours EDX uses for purposes of calculating a retiree's final average salary.

Code	Overtime Hours
00	0
01	100
02	200
03	300
04	400
05	500
06	600
07	700
08	800
09	900
10	1,000
11	1,100

Code	Overtime Hours
12	1,200
13	1,300
14	1,400
15	1,500
16	1,600
17	1,700
18	1,800
19	1,900
20	2,000

