OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM

19

Completing **Work List Requests**

Employer Reporting Guide

How to address requests PERS sends through your Work List, including voluntary contributions, last day of paid leave, termination, and data verification.

Employer Service Center

Contents

Introduction

When PERS needs information from you, we place a request on your EDX Work List. Like a to-do list, your Work List items need to be addressed as soon as possible — your employees' benefit calculations and payments may depend on it.

Check your Work List any time you receive an email notifying you of a new item. It's also good practice to check it any time you are in EDX.

Work List request definitions

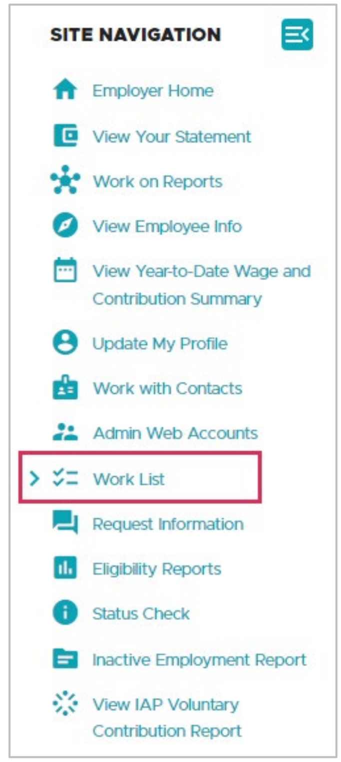
Demographic Correction Request (DCR)	When you submit a DCR to PERS, PERS may return it to you as a DCR Work List item when we have a question about it.
Disability Employment Status	When an employee applies for disability benefits, PERS sends this request to confirm the last day the employee was physically on the job.
Employer Data Verification Request	Employees who are close to retirement can request that PERS verify the data we will use to calculate their benefit amount at retirement. This Work List item is a request for you to verify the information PERS has on file for the employee. It has a firm 30-day deadline.
IAP Voluntary Contribution	The IAP Voluntary Contribution work item is automatically generated to notify you that an employee has elected to make voluntary contributions to their Individual Account Program (IAP) account.
Last Day Paid Leave	This item asks you to confirm that an employee who has applied for disability benefits has not returned to physical work after the date provided in the companion work item Disability Employment Status. It also asks for the last full calendar month of salary prior to the last day physically worked.
Salary Breakdown	PERS sends a Salary Breakdown item to request missing employment, salary, and contribution data for years before 2004.
Salary Certification	A "Salary Cert - Service" or "Salary Cert - Disability" request asks you to certify subject salary and employer-paid pre-tax (EPPT) IAP contributions for a service retiree or disability retiree.
Termination	When an employee is retiring or leaving a job, a Termination work list asks you to provide or confirm certain dates.
Unused Sick Leave	PERS sends this request to verify the amount of unused sick leave the employee had when he or she terminated. PERS will specify if we want the gross amount or capped amount (the capped amount is calculated as explained in employer reporting guide 17 *Calculating Unused Sick Leave Hours at Termination or Retirement*).

Accessing the Work List

1 Select Work List from the EDX main menu.

This opens the Work List screen where you can access your Work List items.

You can choose the order in which items are listed by clicking on any column name. For example, you can choose to list in order of last name, date, or work item type.



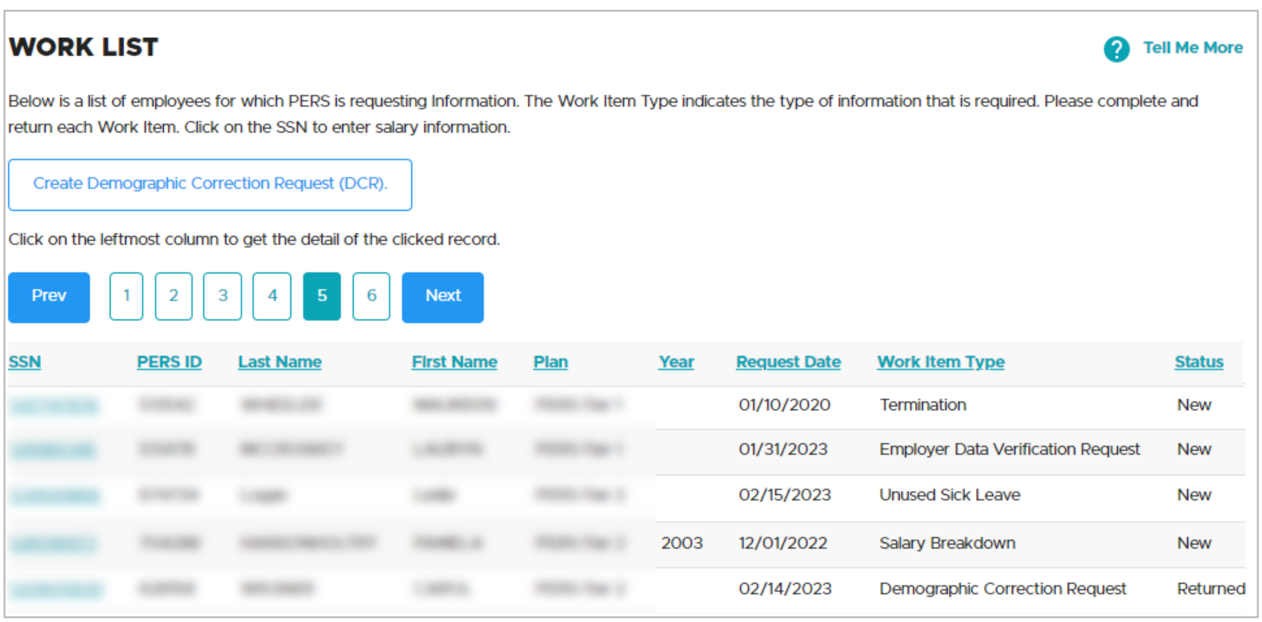
Work List status

The items on your list have one of the following status types:

New — the request has not been saved nor submitted to PERS for review.

Pending — the request has been saved as a work in progress but has not been submitted (saved/certified) to PERS for review.

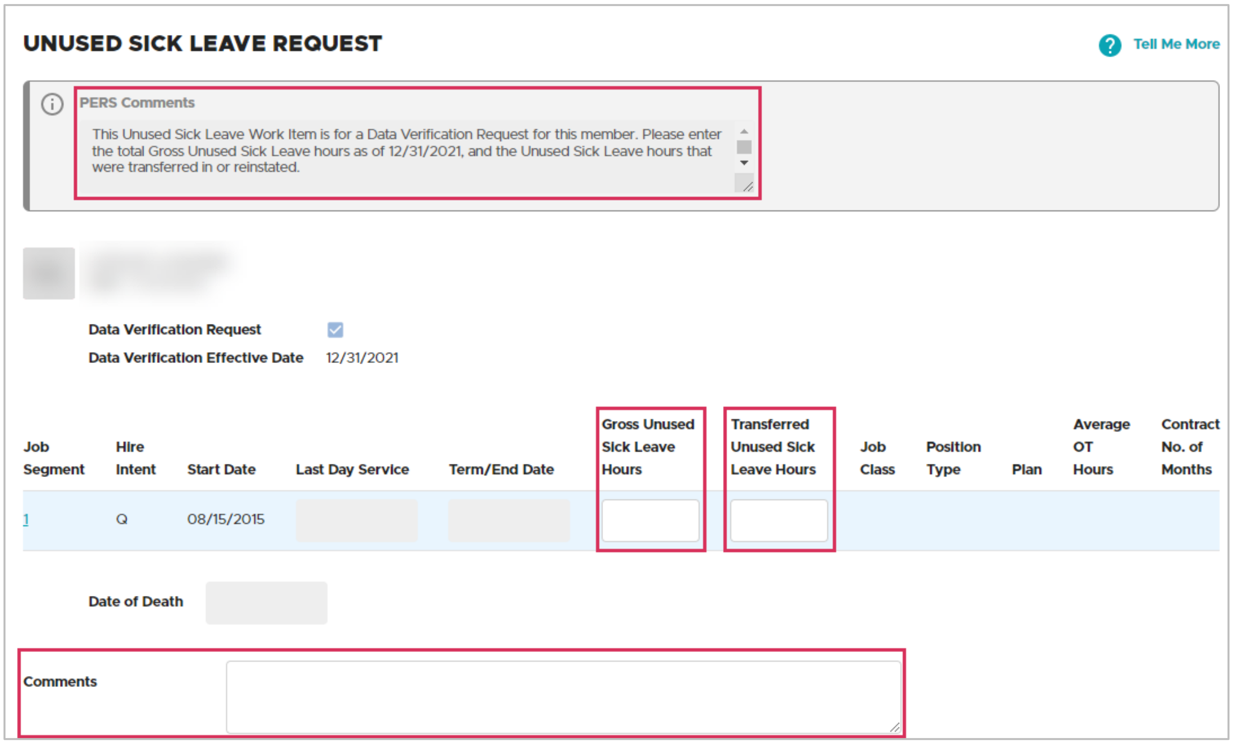
Returned — the request was submitted (saved/certified) and reviewed by PERS but returned to you because of a discrepancy or question. View the request to see comments from PERS.



SSN	PERS ID	Last Name	First Name	Plan	Year	Request Date	Work Item Type	Status
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]		01/10/2020	Termination	New
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]		01/31/2023	Employer Data Verification Request	New
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]		02/15/2023	Unused Sick Leave	New
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2003	12/01/2022	Salary Breakdown	New
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]		02/14/2023	Demographic Correction Request	Returned

2 Click on an employee's Social Security number to open the associated request.

3 Note the information in the PERS Comments box and enter data needed in the blank fields provided, as shown in the Unused Sick Leave request example below.



Comments

Use this field to enter explanations about the information you provided. If you no longer have or are unable to locate archived employment and/or wage information being requested, communicate that in the Comments box and submit to PERS as soon as possible. If PERS has asked a question in the PERS Comments, use the Comments field to respond. This reduces the need for a follow-up email.

Tell Me More

Read the Tell Me More section for instructions and explanations of the Work List item.

TELL ME MORE

Please enter information for the **Gross Unused Sick Leave Hours** and **Transferred Unused Sick Leave Hours** fields.

If this employee is not eligible to participate in the sick leave program, please enter zeros. If you are not entering any data or updating any of the values, you are required to enter **Comments** before submitting to PERS.

Clicking on the **Save** button will save your entered data and the record will be submitted to PERS. This record will be removed from the Work List.

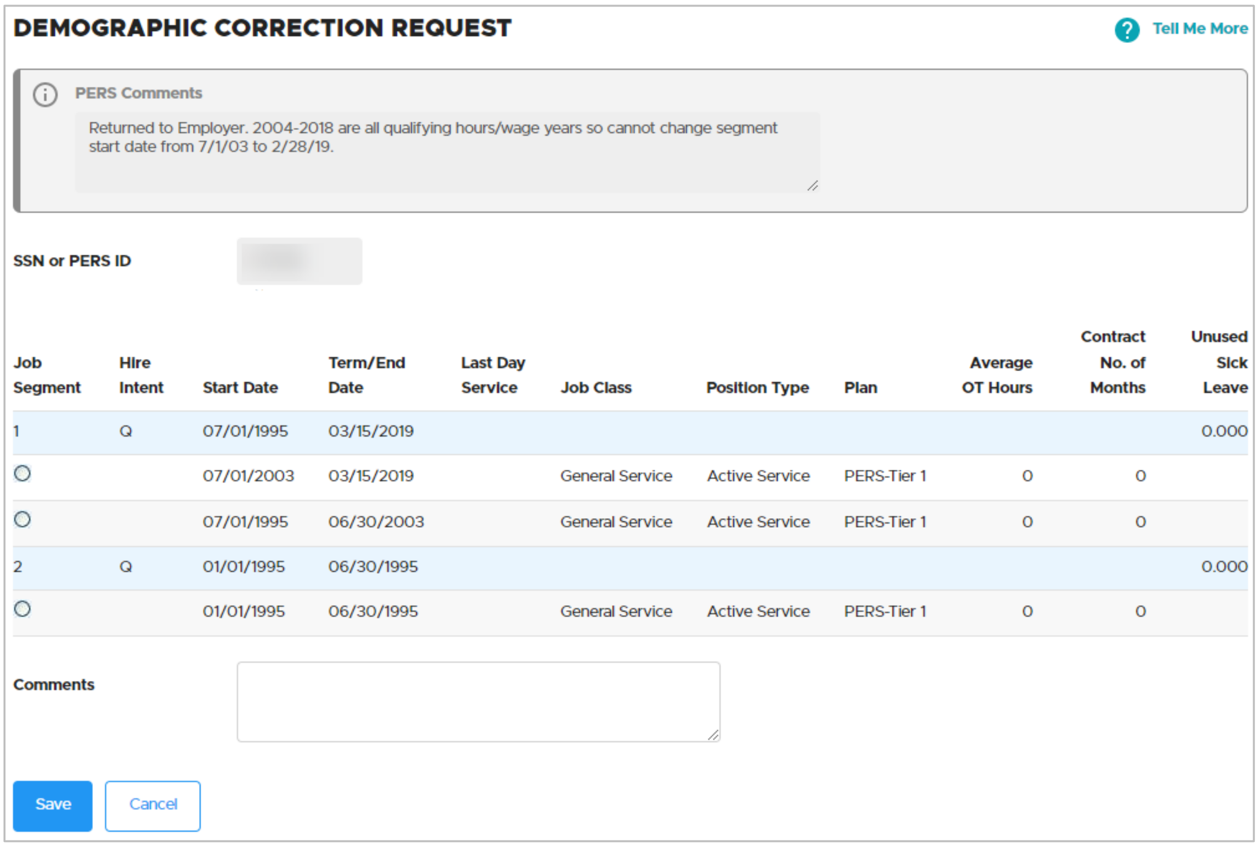
Clicking on the **Cancel** button will cancel any edits you have made.

4 When you're finished, click the **Save** button. This submits the form to PERS for review.

Demographic Correction Request

Demographic Correction Requests are initiated by the employer, not PERS. So, when one appears in your Work List, it always has a status of Returned because PERS is sending it back to you to ask a question, request more information, or explain an issue with your request.

1. Read the PERS Comments section.
2. Provide any requested information.
3. Write a note in the Comments box and click **Save**.



DEMOGRAPHIC CORRECTION REQUEST

Tell Me More

PERS Comments

Returned to Employer. 2004-2018 are all qualifying hours/wage years so cannot change segment start date from 7/1/03 to 2/28/19.

SSN or PERS ID

Job Segment	Hire Intent	Start Date	Term/End Date	Last Day Service	Job Class	Position Type	Plan	Average OT Hours	Contract No. of Months	Unused Sick Leave
1	Q	07/01/1995	03/15/2019							0.000
		07/01/2003	03/15/2019		General Service	Active Service	PERS-Tier 1	0	0	
		07/01/1995	06/30/2003		General Service	Active Service	PERS-Tier 1	0	0	
2	Q	01/01/1995	06/30/1995							0.000
		01/01/1995	06/30/1995		General Service	Active Service	PERS-Tier 1	0	0	

Comments

Save Cancel

Disability Employment Status request

When your employee applies for a PERS disability benefit, PERS sends you a Disability Employment Status request. The form asks you to confirm the last day the employee was physically on the job, as reported by the employee, and whether the employee has worked since that day.

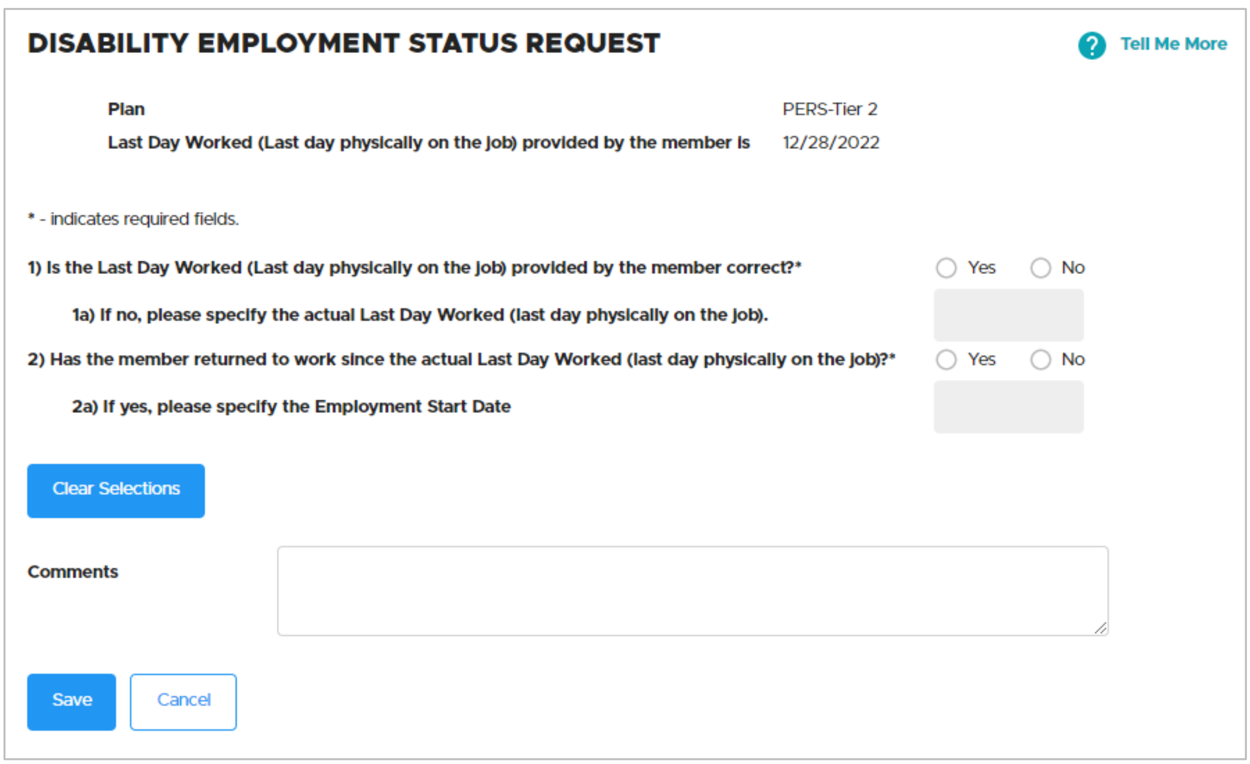
If you choose No for either answer, provide the correct information in the field directly below it.

PERS Disability Unit will also send this Work List request when an OPSRP employee who has been off work on disability is returning to work. In this situation, the purpose of the request is to confirm that the employee has returned to work and on what date they started.

Choose Yes for both answers and enter the employee's start date in the field for 2a.

When you are certain the information you've confirmed or provided is correct, click **Save**. This returns the form to PERS for review and removes the item from your Work List.

Note: If you believe you have received this form in error, **do not** fill it out except to add comments in the Comments field and click **Save**.


DISABILITY EMPLOYMENT STATUS REQUEST

Tell Me More

Plan	PERS-Tier 2
Last Day Worked (Last day physically on the job) provided by the member is	12/28/2022

* - indicates required fields.

1) Is the Last Day Worked (Last day physically on the job) provided by the member correct?* Yes No

1a) If no, please specify the actual Last Day Worked (last day physically on the job).

2) Has the member returned to work since the actual Last Day Worked (last day physically on the job)?* Yes No

2a) If yes, please specify the Employment Start Date

Clear Selections

Comments

Save Cancel

To learn more about PERS disability benefits, read employer reporting guide 14 *Disability Benefits*.

Employer Data Verification request

An Employer Data Verification Work List item requires you to verify employment and salary information for an employee (or former employee) who is close to retirement.

When you receive a data verification request, it is imperative that you complete it before the 30-day deadline. If you miss the deadline, you cannot make changes to the employee's employment history, which could affect the accuracy of the retirement benefits your employee has earned.

Data verification process

The Work List item is one step in a longer data verification process:

1. An employee within two years of retirement requests a Data Verification through Online Member Services or by a paper form.
2. PERS Data Verification team receives the request and mails your employee a report of their employment and salary data.
3. If your employee finds any discrepancies with their own records, they fill out the Additional Account Information form that was included with the report and return it to PERS along with any supporting documentation.
4. PERS staff contacts you (i.e., their current or former employer) to reconcile any discrepancies or questions. There is no deadline for this step.
5. PERS makes initial corrections based on that information.
6. PERS sends you a Data Verification Work List item.
7. You have 30 days to confirm or correct the information. After 30 days, the employee's employment history is locked as posted.

Requesting an extension

You can request a one-time extension of that 30-day period for an individual employee. Within 21 days after receiving the Data Verification request, submit a Data Verification Employer Request for an Extension form. Your request is then sent to PERS Data Integrity Group for review and approval.

Ensuring accuracy

It is vital that your verification be correct. Once you complete your verification (or the 30-day or extended deadline hits), the employee's data are considered verified and "locked." They cannot be changed except as directed by PERS to:

- Reconcile the member's records before the verification is issued.
- Implement changes resulting from a member's successful dispute of the data.
- Re-issue a verification to comply with adjustments for USERRA or to implement a judgment, administrative order, arbitration award, conciliation, or settlement agreement.
- Accommodate an account divided by divorce.
- Restore Tier One status to a Tier Two member who is making a service purchase.

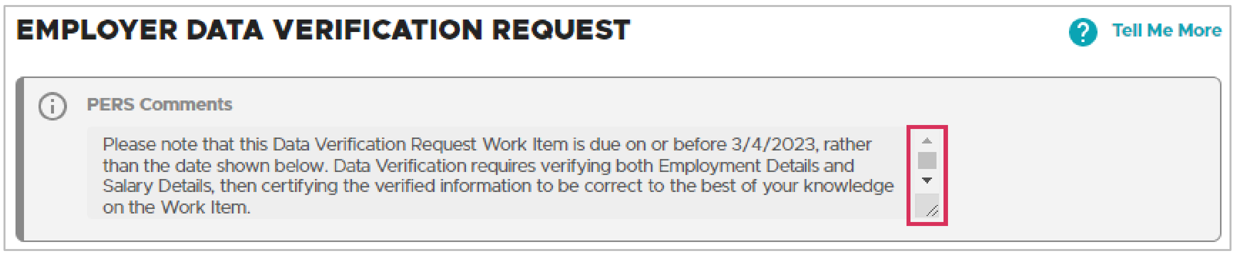
Completing the data verification request

1 When you receive an email notifying you that you have received an Employer Data Verification Request item in your Work List, go to the Work List function in EDX.

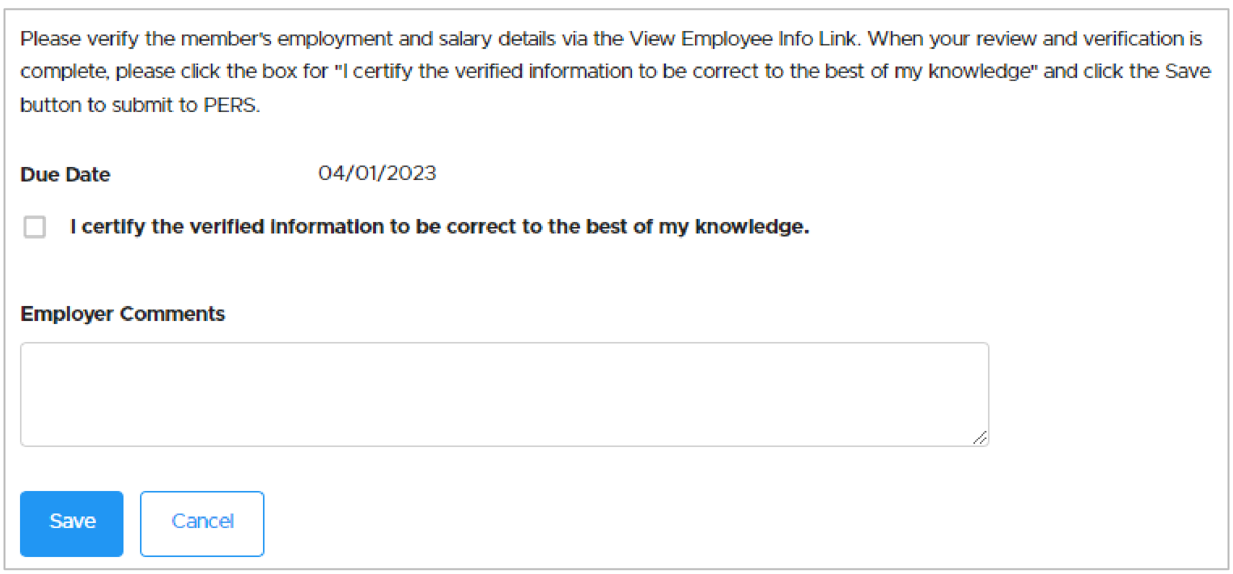
2 Click the SSN associated with the item.

3 Read the comments about the request, as shown in the example below.

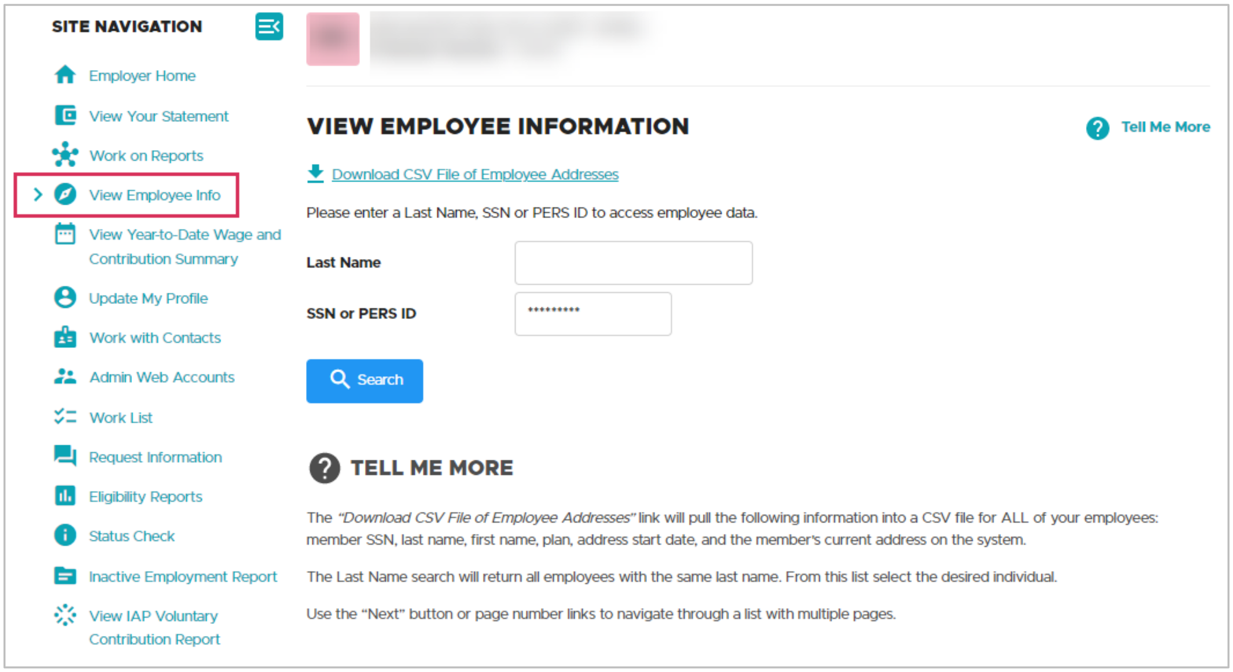
Note the down arrow at the right end of the box. Click the arrow to see the rest of the comment or drag the diagonal lines at the bottom to expand the box to show the rest of the comment.



4 Below the comment box and the employee's name are the due date and a verification check box. **Do not check this box** until you verify the information requested in the comments box. As explained on the screen, go to View Employee Info.



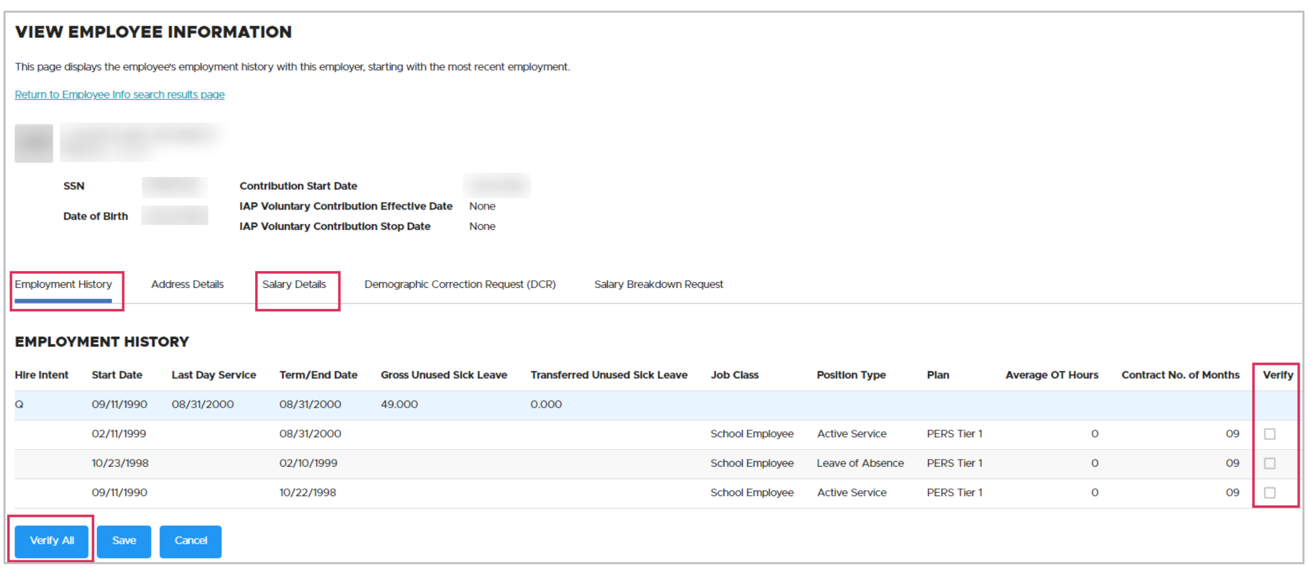
5 Using the **View Employee Info** link in the main Site Navigation, search for the member indicated in the work item by name, Social Security number, or PERS ID.



6 The View Employee Information screen has five tabs or subsections: Employment History, Address Details, Salary Details, DCR, and Salary Breakdown Request. For a data verification, you need to verify the information on the **Employment History** and **Salary Details** tabs.

a) On the Employment History tab, verify the information for each job segment.

- If a work segment matches your records, check the Verify box at the far right. If all segments are correct, you can click **Verify All** at the bottom. Click **Save**.



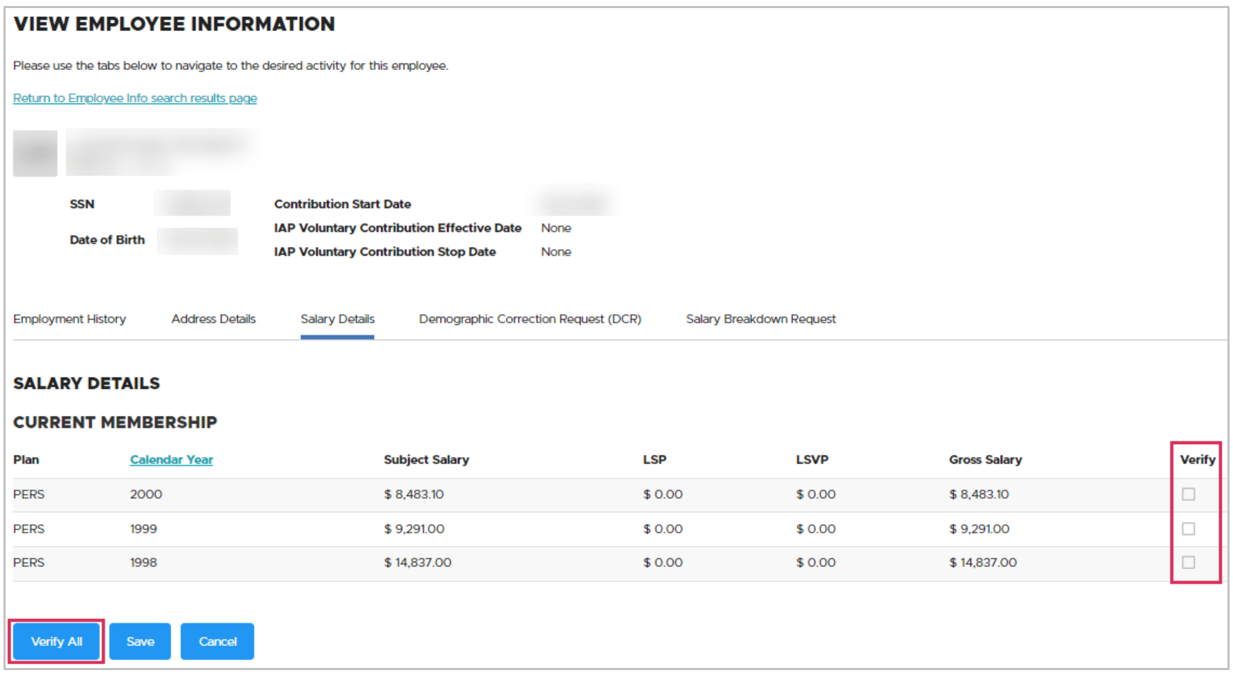
- If any information **does not match your records**, do not check Verify for that segment. If you check Verify for other segments, click **Save** to save your work.

  Create a DCR (by clicking on the Demographic Correction Request tab) and explain the mismatched information. When the correct information is worked out between you and PERS, come back to this screen, check the Verify box for that segment, and click **Save**.

Notes: If an employee withdrew their PERS account or lost membership because of inactivity, their position will display but the Verify field will be disabled.

If an employee has requested a data verification and you were not able to verify their employment history by the deadline, PERS staff will use the information on file. When this happens, the Verify field will be checked and the User ID will display as "PERS." You will not be able to uncheck the Verify field. The data are now locked.

b) On the Salary Details tab, verify the salary information for each year.



VIEW EMPLOYEE INFORMATION

Please use the tabs below to navigate to the desired activity for this employee.

Return to Employee Info search results page

SSN

Date of Birth

Contribution Start Date

IAP Voluntary Contribution Effective Date None

IAP Voluntary Contribution Stop Date None

Employment History | Address Details | Salary Details | Demographic Correction Request (DCR) | Salary Breakdown Request

SALARY DETAILS

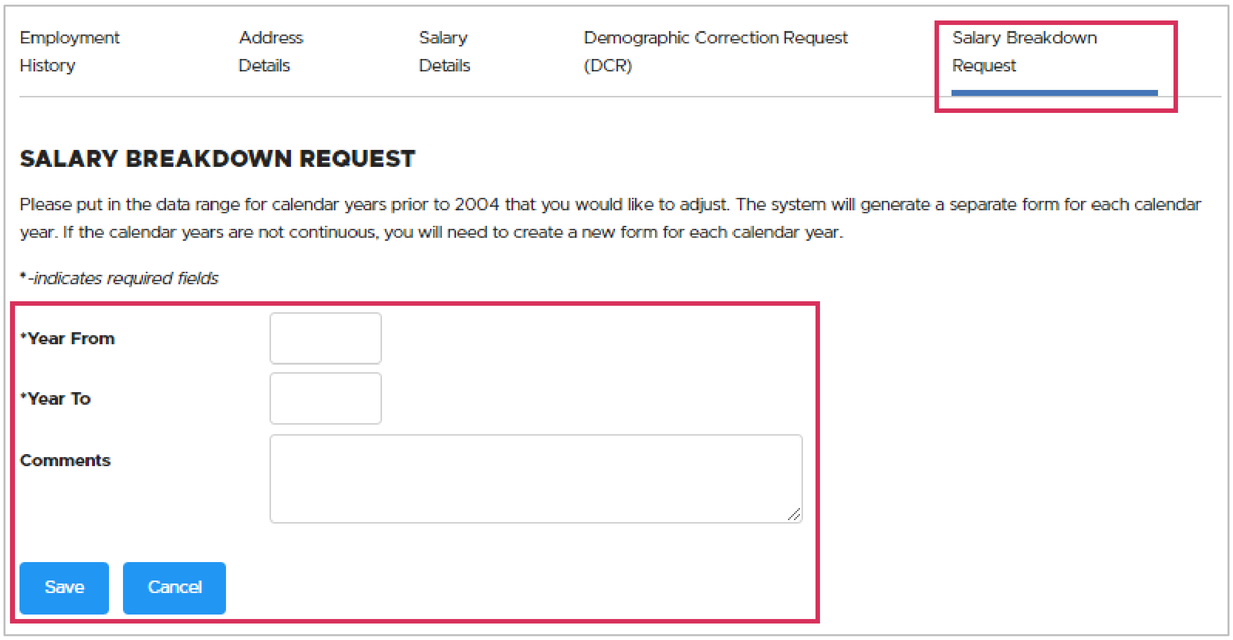
CURRENT MEMBERSHIP

Plan	Calendar Year	Subject Salary	LSP	LSVP	Gross Salary	Verify
PERS	2000	$ 8,483.10	$ 0.00	$ 0.00	$ 8,483.10	☐
PERS	1999	$ 9,291.00	$ 0.00	$ 0.00	$ 9,291.00	☐
PERS	1998	$ 14,837.00	$ 0.00	$ 0.00	$ 14,837.00	☐

Verify All | Save | Cancel

- If the salary information for a year matches your records, check the Verify box at the far right. If all segments are correct, you can click **Verify All** at the bottom. Click **Save**.

- If any salary information does not match your records, do not check Verify for that segment. If you check Verify for other segments, click **Save** to save your work. You can report the correct information to PERS in one of two ways:
    - Create a DCR by selecting the Demographic Correction Request tab. When the correct information is worked out between you and PERS, come back to this screen, check Verify for that year, and click **Save**.
    - Go to the Salary Breakdown Request tab on your screen. You can enter a range of continuous years (e.g., Year From: 2018, Year To: 2020) or a single year (e.g., Year From: 2020, Year To: 2020). Provide the salary information in the Comments box and click **Save**.



7 If you submitted a DCR or a Salary Breakdown Request, the PERS Data Verification team may contact you with questions.

Your response meets the requirements of the 30-day deadline, but you may not submit new information after 30 days unless PERS requests it.

If you do not complete your review by the due date, and you have not notified PERS that changes are needed on the account, PERS staff will complete the member's data verification using the information originally reported.

8 PERS will close the Salary Breakdown Request or DCR and the Data Verification work Item.

Learn more

For more information about how an employee can request a Data Verification, go to the Data Verification webpage.

IAP Voluntary Contribution request

The Member Redirect program was introduced by Senate Bill 1049 (2019) in 2020 to help control rising employer costs. With Member Redirect, a PERS member who earns over a certain amount* per month has a portion of their 6%-of-salary IAP contribution redirected into an account called an Employee Pension Stability Account (EPSA). The funds collected in the account will help pay for the member's pension at retirement.

Tier One and Tier Two members have 2.5% of their 6% IAP contribution redirected and OPSRP members have 0.75% redirected.

*The salary amount is updated each year and listed on the SB 1049 webpage.

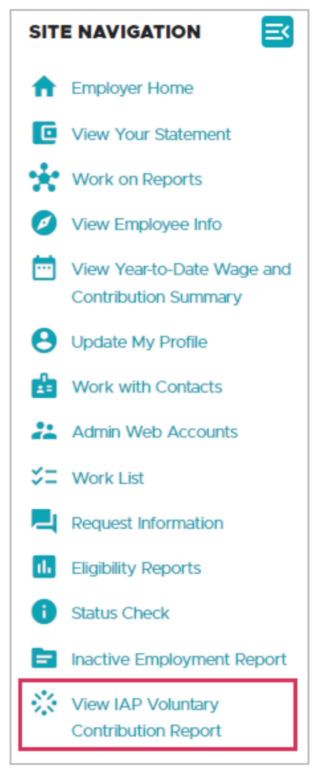
About voluntary contributions

Employees can choose to make an additional, after-tax contribution equal to the amount being redirected into their EPSA (either 2.5% or 0.75% of the 6% IAP contribution), allowing their IAP account to continue funding at 6%. Here's how it works:

1. Employee logs into Online Member Services and chooses the voluntary contribution option.
2. The employer is notified of the employee's election through an IAP Voluntary Contribution Work List request.
3. Starting on the effective date, 2.5% or 0.75% of the employee's monthly IAP contribution is automatically redirected from their IAP to their EPSA (when they earn the required salary amount).
4. The employer sets up a payroll deduction to redeem the voluntary contribution amount from the employee's paychecks on a member-paid after tax (MPAT) deduction.
5. If the employee cancels the voluntary contribution in OMS, the employer receives a Stop-IAP Voluntary Contribution Work List request.
6. The employer stops MPAT deductions on pay checks dated after the effective stop date.

View IAP Voluntary Contribution Report

If you need to know who has signed up for voluntary contributions and how much their deduction is, run an IAP Voluntary Contribution report, as explained on page 16 of this guide.

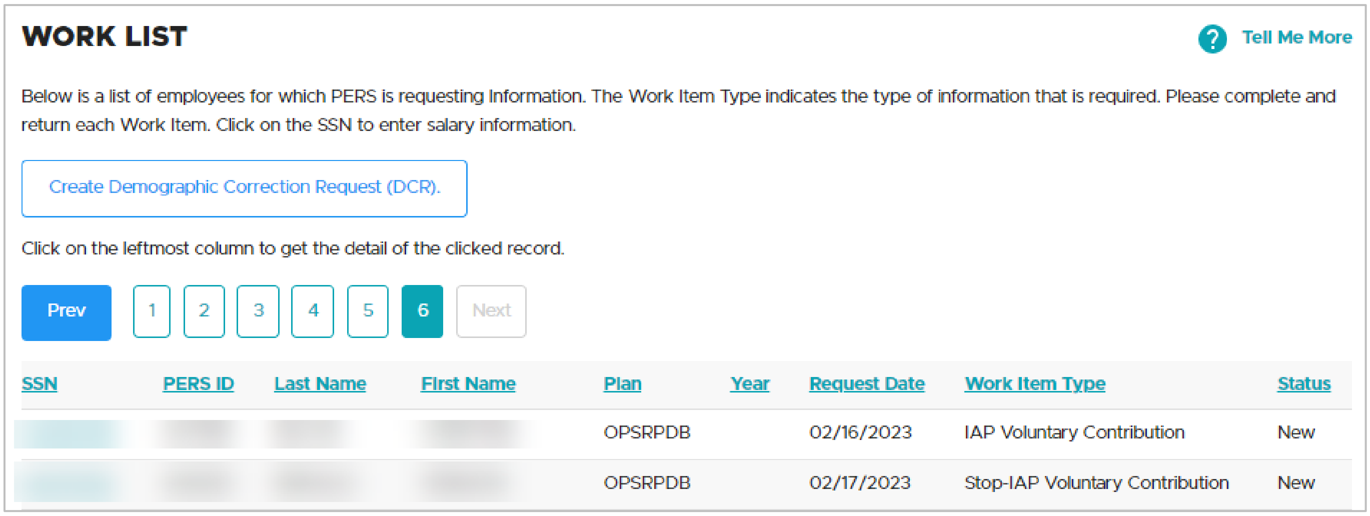


Completing the voluntary contribution request

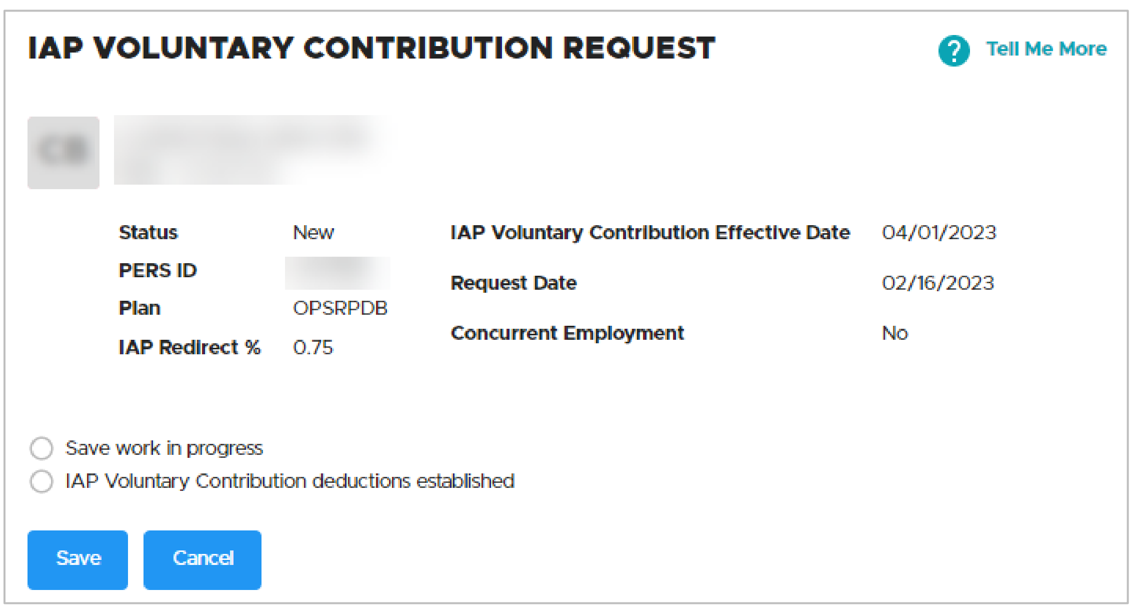
When an employee elects to start (or stop) making voluntary contributions through their OMS account, you are notified by email that you have a new Work List item.

Start voluntary contributions

1. In the EDX main menu, go to Work List.
2. On the Work List screen, locate the IAP Voluntary Contribution work item. It will have a “New” status. Click the linked SSN at the beginning of the row.



3. On the IAP Voluntary Contribution Request screen, click the radio button for “Save work in progress.” This saves the work item in a Pending status on your Work List while you set up deductions for the employee.



4 After you set up deductions in your payroll system, return to this item and click "IAP Voluntary Contribution deductions established."

This certifies that you understand you will be charged for MPAT IAP voluntary contributions for this employee and that you are responsible for withholding the MPAT amount from the employee's paycheck.

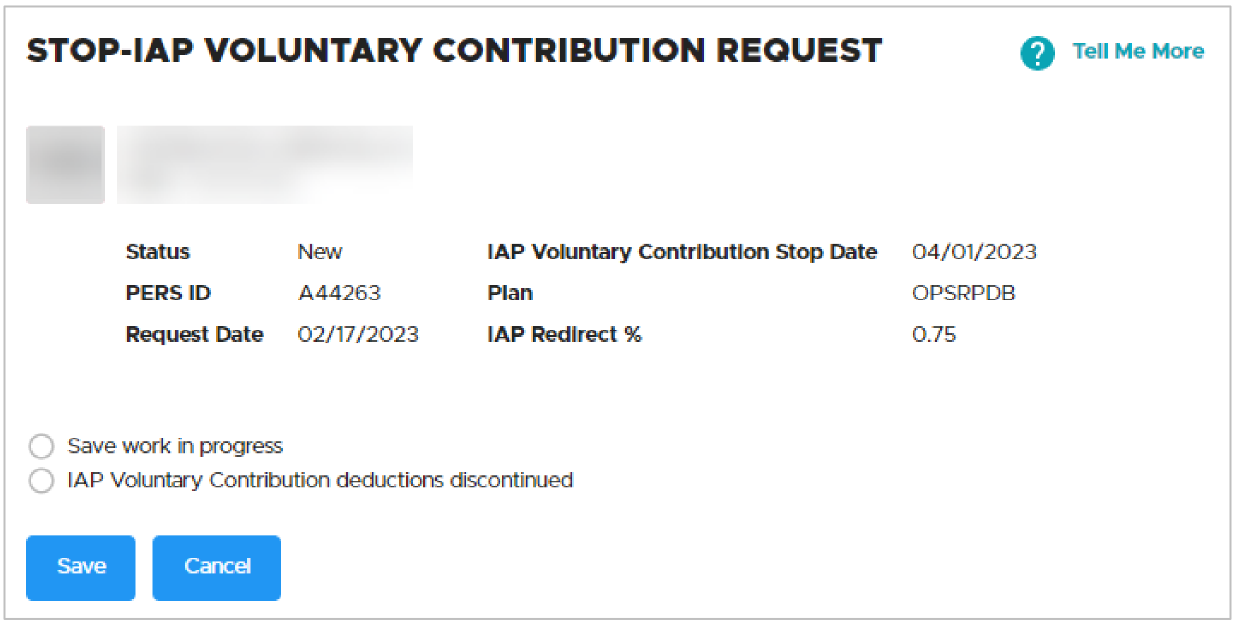
5 Click **Save**. The record will be removed from the Work List.

Stop voluntary contributions

1 In the EDX main menu, go to Work List.

2 On the Work List screen, locate the Stop-IAP Voluntary Contribution work item. Click the linked SSN at the beginning of the row.

3 On the Stop-IAP Voluntary Contribution Request screen, click the radio button for "Save work in progress." This saves the work item in a Pending status on your Work List while you stop deductions for the employee.


STOP-IAP VOLUNTARY CONTRIBUTION REQUEST

Tell Me More

Status	New	**IAP Voluntary Contribution Stop Date**	04/01/2023
PERS ID	A44263	**Plan**	OPSRPDB
Request Date	02/17/2023	**IAP Redirect %**	0.75

Save work in progress

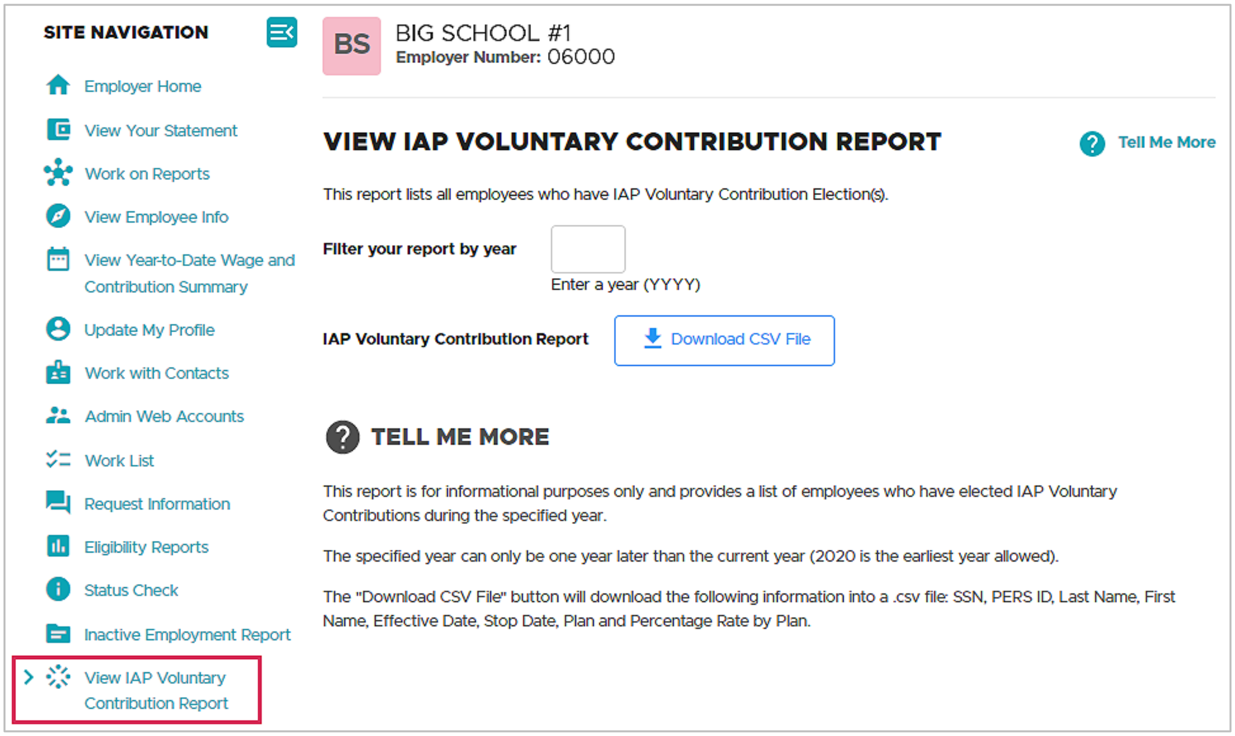
IAP Voluntary Contribution deductions discontinued

Save Cancel

4 After you stop deductions in your payroll system, return to this item and click "IAP Voluntary Contribution deductions discontinued." Click **Save**.

How to run an IAP Voluntary Contribution Report

1. To run a report of employees who have opted to make voluntary contributions, choose View IAP Voluntary Contribution Report from the main menu.
2. On the View IAP Voluntary Contribution Report screen, enter the search year for the report you want and click **Download CSV File**.



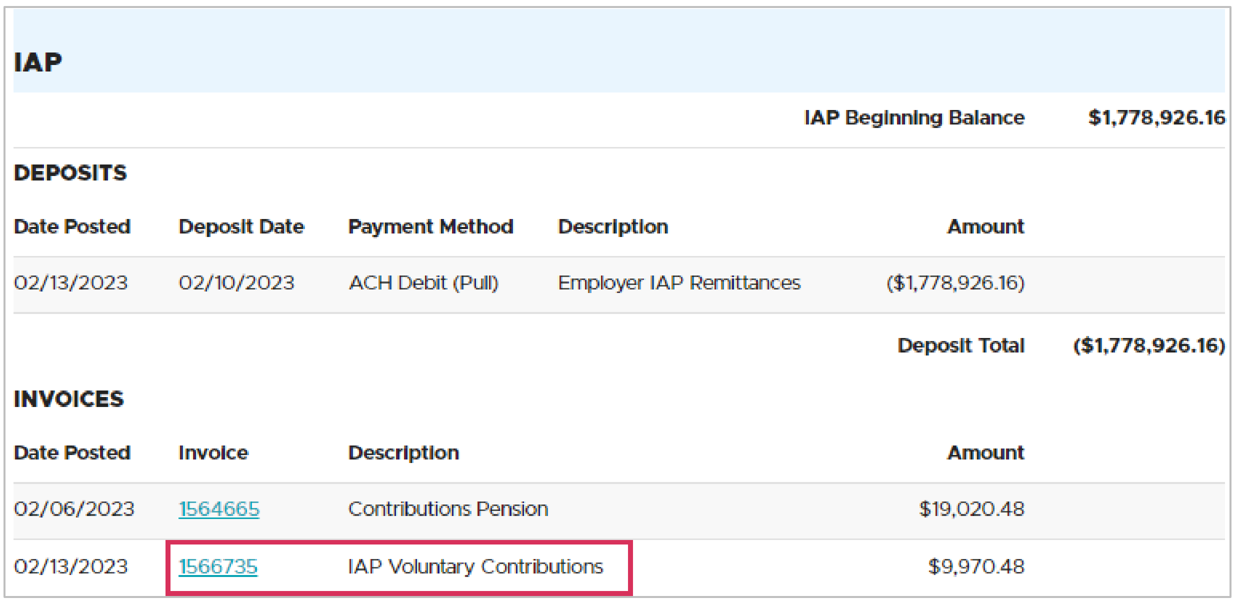
3. An Excel file downloads to your computer. It lists all employees who elected to start or stop voluntary contributions organized by membership plan.

For more information about this report, read employer reporting guide 24 *Running Reports*.

How to find voluntary contribution charges on your statement

1 Go to View Your Statement and click the Employer Statement tab.

2 Scroll down to the IAP section under Invoices. You will see an invoice for IAP Voluntary Contributions. Click the invoice number to see the invoice.



IAP

IAP Beginning Balance	**$1,778,926.16**

DEPOSITS

Date Posted	Deposit Date	Payment Method	Description	Amount
02/13/2023	02/10/2023	ACH Debit (Pull)	Employer IAP Remittances	($1,778,926.16)
			Deposit Total	**($1,778,926.16)**

INVOICES

Date Posted	Invoice	Description	Amount
02/06/2023	1564665	Contributions Pension	$19,020.48
02/13/2023	1566735	IAP Voluntary Contributions	$9,970.48

3 On the IAP screen, click the IAP link.

IAP

Type	Pay Date	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP	Unit	Employer	Total
IAP	01/20/2023	$0.00	$9,970.48	$0.00	$0.00	$0.00	$0.00	$0.00	$9,970.48
IAP Totals		**$0.00**	**$9,970.48**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$9,970.48**

4 This opens a detail screen displaying voluntary contribution charges per employee.

IAP

Last Name	SSN	Pay Date	Wage Type	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP
		01/20/2023	Positive Adjustment	$0.00	$36.58	$0.00	$0.00	$0.00
		01/20/2023	Positive Adjustment	$0.00	$52.24	$0.00	$0.00	$0.00
		01/20/2023	Positive Adjustment	$0.00	$201.66	$0.00	$0.00	$0.00

Last Day of Paid Leave request

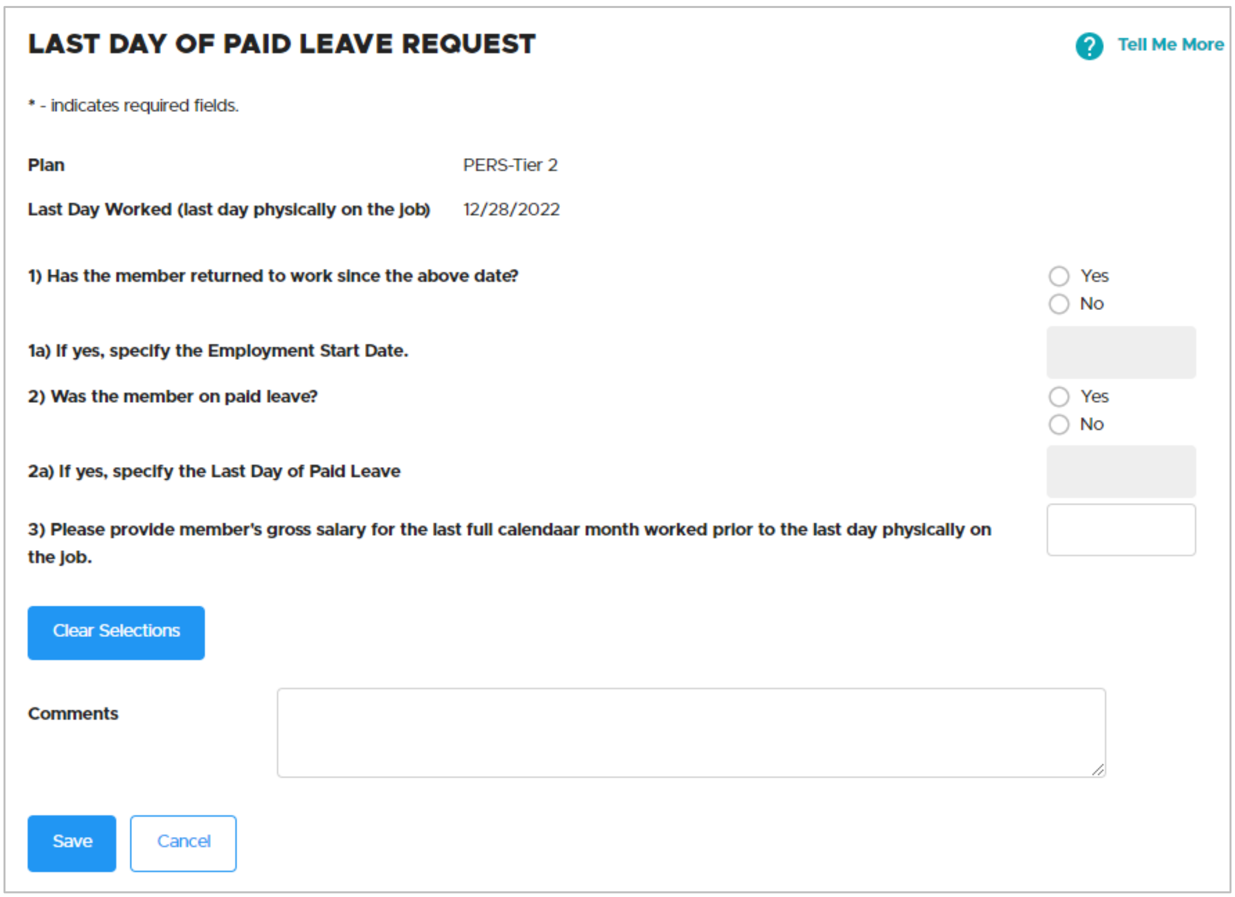
PERS sends you a Last Day of Paid Leave Work List request when an employee has been approved for disability benefits. The purpose is to confirm an employee's last day on the job and last day of paid leave.

1 Go to your Work List and locate the Last Day of Paid Leave item.

2 Click the Social Security number to open the Last Day of Paid Leave screen.

3 Answer question 1, "Has the member returned to work since the above date?":

- If the last day worked is correct and the employee has not worked since that day, click **No**.
- If the last day worked is not correct or the employee has worked since that day, click **Yes** and enter the correct last day worked in the box for 1a.


LAST DAY OF PAID LEAVE REQUEST

Tell Me More

* - indicates required fields.

Plan PERS-Tier 2

Last Day Worked (last day physically on the job) 12/28/2022

1) Has the member returned to work since the above date? Yes No

1a) If yes, specify the Employment Start Date.

2) Was the member on paid leave? Yes No

2a) If yes, specify the Last Day of Paid Leave

3) Please provide member's gross salary for the last full calendaar month worked prior to the last day physically on the job.

Clear Selections

Comments

Save Cancel

4 Answer question 2, "Was the member on paid leave?":

- Always click **Yes**, even if the employee did not take any paid leave.
- "Paid leave" refers to any days when your employee was receiving employer-provided paid time off, including sick leave, vacation, comp time, and employer payments to supplement workers' compensation or other third-party insurance.
  - It does not include days when the employee was receiving workers' compensation or disability insurance provided by a third party *unless your organization was supplementing these payments*.
  - It does not include days when the employee was receiving payments from Paid Leave Oregon *unless your organization's Paid Leave Oregon plan is provided by your organization*.
- If the employee did not take any paid leave (or took an unpaid leave), enter the last day worked in the box for 2a.
- If the employee did take paid leave, enter the last day of their paid leave in the box for 2a. Note that disability payments cannot begin until the employee is no longer receiving employer-paid leave.

5 For question 3, enter the gross salary your employee earned in the last full calendar month they worked prior to their last day physically on the job. For example, if the last day they worked was May 15, enter their gross salary for April.

6 If you want to add any comments, type them into the **Comments** text box.

Note: If you post any wage records more than 31 days past the last date of paid leave, explain why in the Comments field. If you don't explain these wages, PERS will presume that you are posting disability income (which isn't necessary).

7 Click the **Save** button to submit the request to PERS for review. The item is removed from your Work List. If you click **Cancel** to exit without saving, the item will remain on your Work List with Pending status.

Salary Breakdown request

PERS sends you a Salary Breakdown request to capture missing employment, salary, and contribution data for the employee and year indicated. PERS needs the information to determine benefits for years before 2004 (when PERS switched from paper records to digital).

If information for multiple years is needed, you will receive a separate request for each year.

1 On the Salary Breakdown screen (shown on the next page), complete these fields:

  Contract No. of Months — only if this is a school employee.

  Job Class — click the dropdown menu and choose from the list.

  Start Date — their first day as your employee.

  Multiple Employment Segments — Check this box if the employee was hired and terminated more than once in the year indicated. Provide all employment dates for the year in the **Comments** box. If you do not check the box and there are gaps in the member's employment, explain why in the **Comments** box.

  Default Contribution Type — If the IAP contribution type was the same throughout that year, choose it here (employer-paid pre-tax (EPPT), member-paid pre-tax (MPPT), or member-paid after tax (MPAT)). This will populate the rest of the form with that same contribution type. If more than one contribution type applies to that year, choose it individually by month.

  Term Date — "Termination date." Complete this field if the member terminated within the indicated year and was not reemployed in the same year. This is the date of the last day they were employed with you.

  Hours — hours worked in each month.

  Salary — subject salary for each month.

  Contribution Type — choose the IAP contribution type for each month if it varied or changed that year.

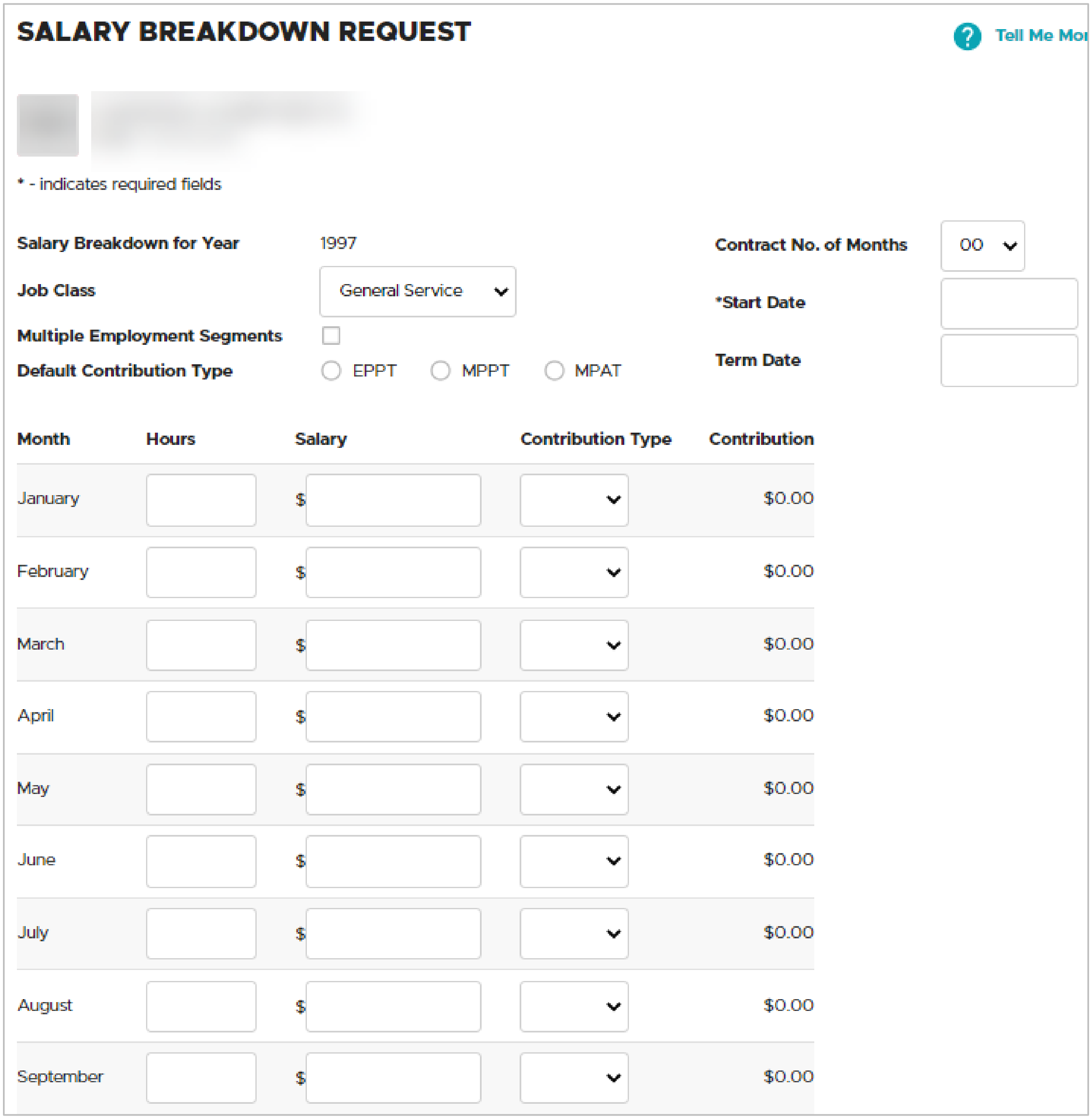
  Calculate — click the button to calculate totals for the columns above and display the estimated financial impact. This amount is based on the information provided on the Salary Breakdown form and is only an estimate. The actual invoice amount will be determined by PERS.

  Comments — In the Comments field, explain the following:

  - Any months without hours and salary (e.g., "no salary reported for [month] to [month] because employee on was leave").
  - The hire intent for this employment — qualifying or nonqualifying.
  - If your organization is a Community College, provide the converted full-time equivalent (FTE) number for academic employees.

2 When you are certain the information you have entered is correct, click "I certify the above to be correct to the best of my knowledge" and click **Save**. This submits the form to PERS and removes the request from your Work List.

  Clicking the **Cancel** button cancels any edits that have not been saved. The form will revert to the last saved information.



SALARY BREAKDOWN REQUEST

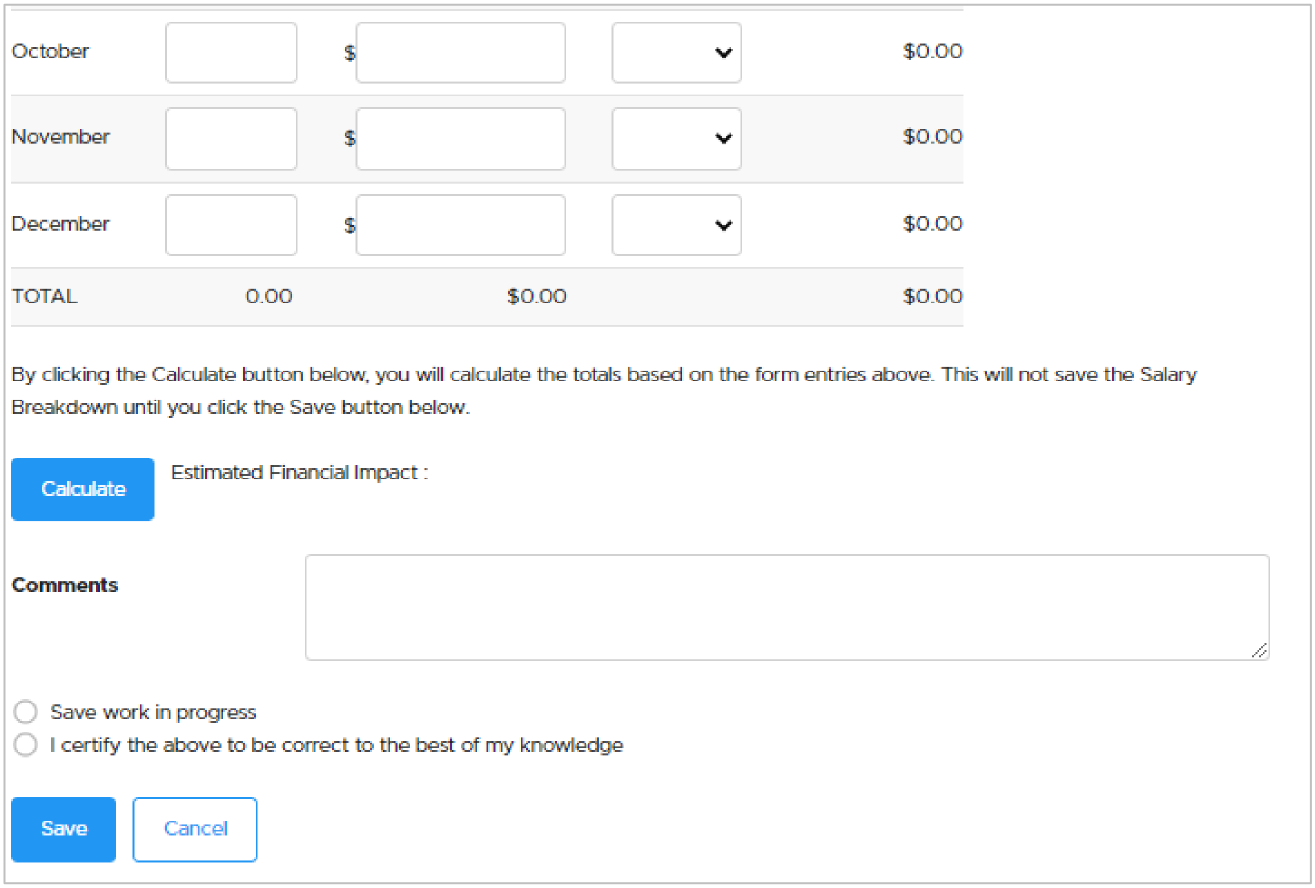
Tell Me Mor

* - indicates required fields

Salary Breakdown for Year	1997	**Contract No. of Months**	00
Job Class	General Service	***Start Date**	
Multiple Employment Segments		**Term Date**	
Default Contribution Type	EPPT MPPT MPAT		

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

continued



October		$		$0.00
November		$		$0.00
December		$		$0.00
TOTAL	0.00	$0.00		$0.00

By clicking the Calculate button below, you will calculate the totals based on the form entries above. This will not save the Salary Breakdown until you click the Save button below.

Calculate

Estimated Financial Impact :

Comments

Save work in progress

I certify the above to be correct to the best of my knowledge

Save

Cancel

Salary Certification request

PERS sends a Salary Certification Work List request to confirm an employee's subject salary and employer-paid pre-tax (EPPT) IAP contributions for a calendar year prior to 2004, which is when PERS' records moved from paper to online.

- Salary Cert – Service is for an employee applying for a service retirement (i.e., a regular retirement based on age).
- Salary Cert – Disability is for an employee applying for a disability retirement (Tier One and Tier Two only).

When you open a Salary Certification Work List item (shown on the next page of this guide), first note any comments from PERS in the comments box.

Note the year and the reported annual salary. The salary includes total subject salary, total subject overtime salary, and total lump-sum payoffs. For Tier One members, it also includes any total lump-sum vacation payoffs.

Complete the form as follows, heeding the specific instructions for Tier One and Tier Two employees on the form:

1. Enter the subject salary and IAP EPPT contributions, if applicable, for every month the employee worked or was paid.

   Do not enter member-paid pre-tax (MPPT) or member-paid after tax (MPAT) IAP contributions.

   For Tier One employees, enter salary in the month it was *paid*. Include any lump-sum vacation payments.

   For Tier Two local-government employees (i.e., the employer is a city, county, or political subdivision), report the salary in the month it was *earned*, not paid. For all other Tier Two employees, enter salary in the month it was paid.

   For all Tier Two employees, do not include lump-sum vacation payments.

2. Click the **Calculate** button to view totals for salary and contributions.
3. Enter any comments or explanations in the Comments box.
4. When you are certain the information you have entered is correct, click "I certify the above to be correct to the best of my knowledge" and click the **Save** button. This submits the form to PERS and removes the request from your Work List.
5. If you want to save your work while you look up some information, click "Save work in progress" and click **Save**.

   Clicking the **Cancel** button cancels any edits that have not been saved. The form will revert to the last saved information.

SALARY CERTIFICATION REQUEST

Tell Me More

PERS Comments

test need info

Salary Certification for year	2002
Reported Annual Salary	$ 41,620.88
Member's Plan	PERS-Tier 2

Tier 1: Report salary in month paid. Include lump-sum vacation payments.
Tier 2: Do Not include lump sum vacation payments.
Tier 2: If your organization is a city, county or political subdivision, report salary when earned, not when paid.

Month	Subject Salary	EPPT	Subject Salary + EPPT
January	$	$	$
February	$	$	$
March	$	$	$
April	$	$	$
May	$	$	$
June	$	$	$
July	$	$	$
August	$	$	$
September	$	$	$
October	$	$	$
November	$	$	$
December	$	$	$
TOTAL	$	$	$

By clicking the Calculate button below, you will calculate the totals based on the form entries above. This will not save the Salary Certification until you click the Save button below.

Calculate

Comments

- Save work in progress
- I certify the above to be correct to the best of my knowledge

Save Cancel

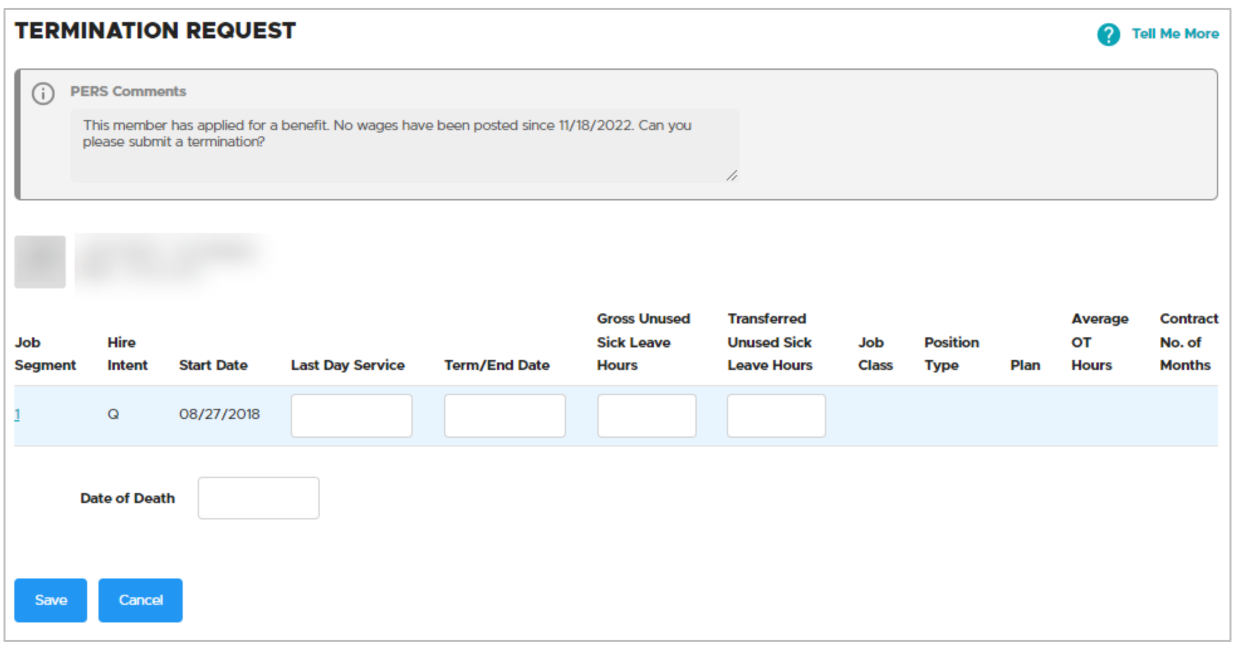
Termination request

When you submit a termination record to report an employee leaving your employment, PERS will send you a Termination Work List request if we need any additional information to correctly process the employee's benefits. You may also receive a Termination request if an employee has indicated that their employment has ended, and they have applied for a benefit. Their employment must be terminated in the system before PERS can process their benefit.

You need to provide this information (including final wages) within 31 days of the employee's termination date.

Complete the request as follows:

1. Access the Work List screen.
2. Click on the SSN of the employee associated with "Termination" shown in the Work Item Type column.
3. When the request opens, first read the PERS Comments text box to understand the reason for the Termination request and the information we need from you before we can begin processing the employee's benefit request.
4. Verify the start date listed. If it is incorrect, submit a Demographic Correction Request (DCR) to PERS to request a correction.



5 Fill in these required fields:

Last Day Service — the employee's last day physically on the job.

Term/End Date — the employee's last day as an employee with you (e.g., if their last day worked was Friday August 12, followed by two weeks of vacation; their term date is Friday August 26).

Gross Unused Sick Leave Hours — their total, uncapped sick leave hours.

Transferred Unused Sick Leave Hours — any sick leave hours the employee transferred in from a previous PERS-participating employer.

If the employee is not eligible to participate in the unused sick leave program (e.g., your organization does not participate in the program or the employee is an OPSRP member), enter a zero in both the Gross Unused Sick Leave Hours and the Transferred Unused Sick Leave Hours fields.

6 Do not enter a date in the Date of Death field unless you are reporting the employee's death.

7 Click the **Save** button to submit the request to PERS or click the **Cancel** button to exit without saving.

Note: If you leave out required information, enter an invalid date in the Last Day Service and/or Term/End Date text boxes, or attempt to complete a Termination Request after a member's account is closed, EDX displays a Validation Error dialog box.

If there are no errors, EDX displays a confirmation box to tell you the form has been submitted to PERS for review. The item is removed from your Work List.

Unused Sick Leave request

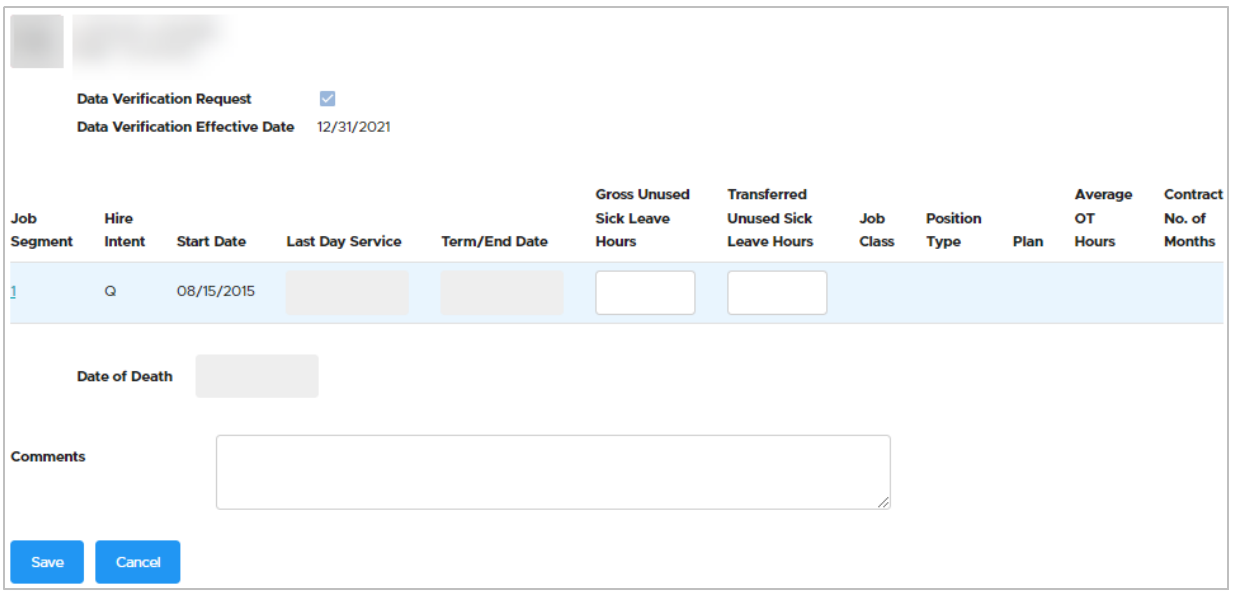
The Unused Sick Leave Work List item asks you to provide gross unused sick leave hours and transferred-in unused sick leave hours for an employee who is eligible to receive credit for unused sick leave at retirement or termination. Eligible employees are members of Tier One or Tier Two whose employer participates in the unused sick leave program.

1. Complete the request by filling in the following required fields:

   Gross Unused Sick Leave Hours — their total, uncapped sick leave hours (the sum of sick leave earned working for your organization plus any transferred-in hours).

   Transferred Unused Sick Leave Hours — any sick leave hours the employee transferred in from a previous PERS-participating employer.

2. If applicable, use the Comments field to explain where the transferred unused sick leave hours came from and if they came from multiple previous employers.
3. Click **Save**. This submits the form to PERS and removes the item from your Work List.



Get help

If you have questions about a Work List request, contact your Employer Service Center representative.