

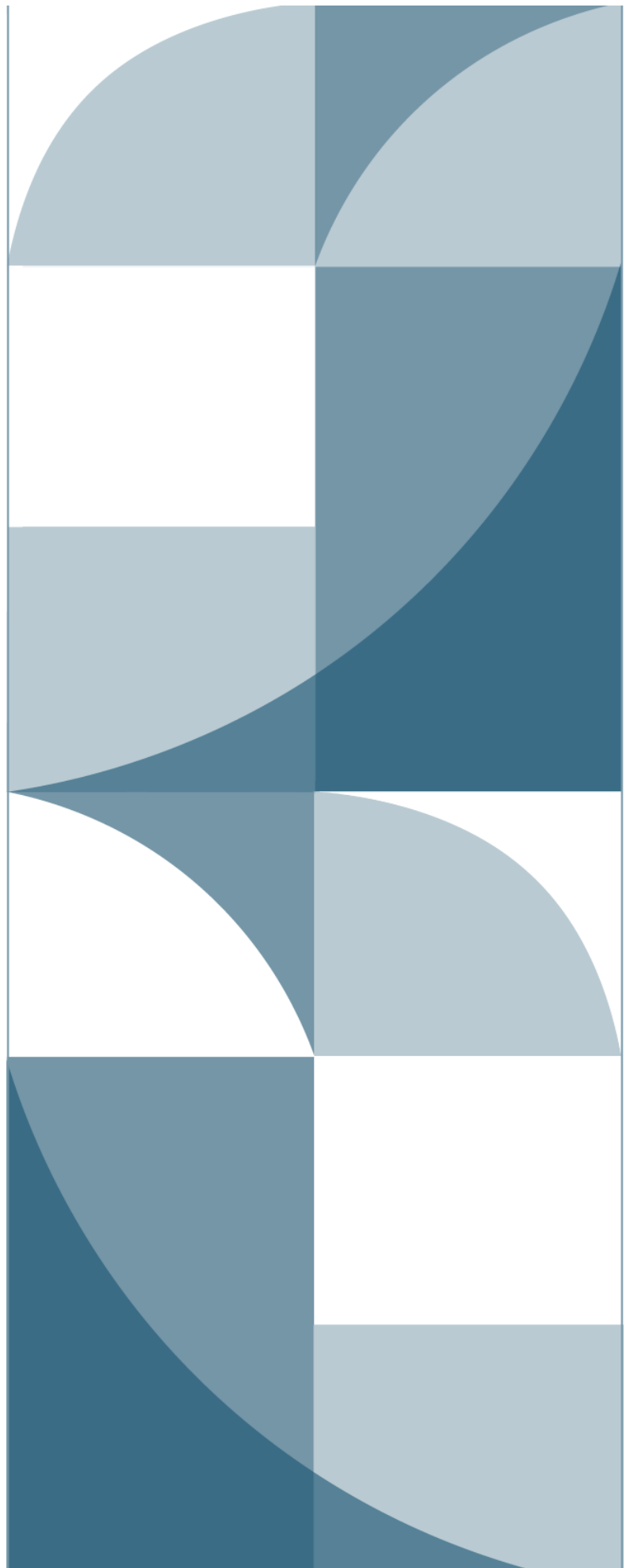


Employer **Requirements and Support**

Employer Reporting Guide

This guide explains the important role of employer reporters and what you need to know to perform the role.

**Employer
Service
Center**



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Introduction

This guide explains the important role that employers play in the PERS system and the information you need to perform that role.

Employer obligations

Employers have a great responsibility under Oregon law as established by Oregon Revised Statutes (ORS) chapters [238](#) and [238A](#). Employers provide the data and the funding that fuel the PERS system.

Responsibilities



Employers participating in PERS are required to:

- Continue to participate in the Oregon Public Service Retirement Plan (PERS).
- Participate in the Individual Account Program (IAP).
- Provide benefits under the pension program established under [ORS 238A.100 to 238A.250](#) for eligible employees who are members of the pension program.
- Fund the pension benefits for eligible employees who are members of the pension program.
- Remit reports and payments on time.

Required roles

Every PERS-participating employer must assign two roles to manage their PERS account. The responsibilities of these roles are explained in employer reporting guide 3, [Reporter Roles and EDX Access](#), and in the videos listed below.

https://www.oregon.gov/pers/emp/Documents/Employer-Publications/Manuals-Guides/Employer-Guide_Ch3_Roles-and-EDX-Access.pdf

Web administrator	Employer reporter
<p>This role manages access to the account by approving employer reporter accounts, unlocking accounts, and maintaining the contacts list.</p>	<p>This role reports employee wages, hours worked, demographic information, work status, job type, and more to PERS through the Employer Data Exchange (EDX) web tool. Each employer can have up to 15 employer reporters.</p>
 <p>https://vimeo.com/manage/videos/871509023/43e631fd29</p>	 <p>https://vimeo.com/manage/videos/896704158</p>

Other roles

In addition to the web administrator and employer reporter roles, your EDX account must include contact information for people who are authorized to discuss your account with PERS. The web administrator is responsible for filling in contact information for the following roles in your EDX contact list:

Reporting official — Typically the head of the agency/organization or someone responsible for making financial decisions.

Personnel — Typically the PERS contact in the Human Resources department.

Payroll — Typically the PERS contact in the Payroll department.

Other — Anyone else an employer wants to list as a contact.

Employer number

PERS assigns a five-digit number (four digits with a leading zero) to each employer. The number is based on the type of employer you are and what pool you are in (if applicable).

Always include your employer number when corresponding with PERS. This ensures that you are not confused with another employer with a similar name.

Employer group	Employer numbers start with
State governments	01000
Local governments	02000
School districts	03000 or 04000

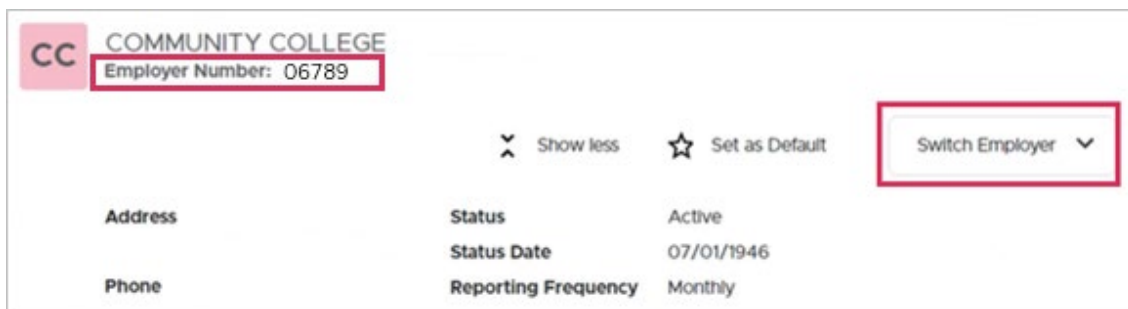
Where to find it

You can find your employer number in EDX. Once you log in and choose your employer, you can see the number displayed at the top of the screen under your employer name.

Your number is also on your [annual actuarial valuation](#).

<https://www.oregon.gov/pers/Pages/Financials/Actuarial-Valuations.aspx>

Note: If you report for one employer, the home page shows that employer. If you report for multiple employers, you will see the **Switch Employer** button on the right of your screen. Click it to open a drop-down list of your employers.



Getting support from the Employer Service Center

Who they are

The PERS Employer Service Center (ESC) is staffed with 24 specially trained PERS experts. Most of these experts are split into three teams that specialize in specific employer-reporting issues:

1. Local governments.
2. State agencies.
3. Schools, Oregon university system, and community colleges.

Every employer is designated one account representative. If your representative is unavailable, you can contact any member of your ESC account team. ESC contact information is listed on the [ESC Representatives webpage](#).

<https://www.oregon.gov/pers/EMP/Pages/ESC-Representatives.aspx>

What they do

The focus of the ESC is assisting employers with their reporting in EDX and understanding how PERS rules and laws apply to them.

ESC representatives can access your employer account and work with you to fix issues and find the information you need. If you need help or information not related to reporting, our employer representatives will help make sure you get to the right person at PERS to get your questions answered.

Who they support

ESC only assists PERS-participating employers. They cannot support PERS members with questions about their personal PERS accounts.

If your employees have questions about their personal account, they can call the Member Information Center (MIC) at 888-320-7377 (option 1) on weekdays between 8:30 a.m. and 5:00 p.m. Pacific Time.

How to reach ESC

By email

ESC representatives are available to answer emailed questions Monday to Friday from 8 a.m. to 5 p.m. Email your assigned representative directly or email the [Employer Support inbox](mailto:PERS.EDX.Support@pers.oregon.gov) at PERS.EDX.Support@pers.oregon.gov. Most emails are answered within 24 hours.

By phone

ESC representatives are available to assist by phone Monday to Friday. Call your assigned representative's direct phone line between 8:00 a.m. to 4:00 p.m. or the Employer Call Center line between 8:30 a.m. to 12:00 p.m. at 888-320-7377.

Learning how to report to PERS

For more information on training, go to the [Employer Training webpage](https://www.oregon.gov/pers/emp/Pages/Training.aspx).
<https://www.oregon.gov/pers/emp/Pages/Training.aspx>

ESC also provides the [Employer Reporting Guide series](#). This series of 28 guides and 8 quick references helps employers understand PERS benefits and how to report employee information to PERS.

<https://www.oregon.gov/pers/EMP/Pages/employer-manuals.aspx>

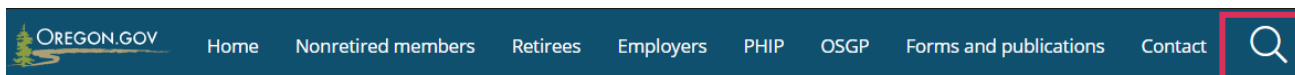
Staying informed

PERS helps employers stay informed through the PERS Employer website, the employer newsletter, direct emails, annual reports, and meetings.

Website

The PERS website is your main source of information. To access the Employer section, go to the [PERS Employer website](https://www.oregon.gov/pers/EMP/Pages/index.aspx). <https://www.oregon.gov/pers/EMP/Pages/index.aspx>

To search for information on the website, click the magnifying glass icon at the top right of the PERS website. Type your search terms and click Enter.



Important webpages

Below are links to webpages with important information for employer reporters, financial and budgeting professionals, and human resources professionals.

[What Plan Am I In? webpage](#)

Definitions of PERS' three pension programs. The program a member is in depends on when they became a PERS member. <https://www.oregon.gov/pers/mem/Pages/What-plan-am-I-in.aspx>

[Benefit Component Comparisons](#)

Lists the primary components and differences among the PERS Tier One and Tier Two programs, the Oregon Public Service Retirement Plan (OPSRP) pension program, and the Individual Account Program (IAP). <https://www.oregon.gov/pers/mem/Pages/Benefit-Component-Comparisons.aspx>

[Introduction to PERS Reporting](#)

Overview of the employer reporting role and how to learn it. <https://www.oregon.gov/pers/emp/Pages/Reporting-to-PERS.aspx>

[Employer Announcements](#)

Announcements about changes to PERS policies, programs, or processes from 2005 to 2021. <https://www.oregon.gov/pers/EMP/Pages/employer-announcements.aspx>

[Employer Newsletters](#)

Archive of the monthly *Employer News*. <https://www.oregon.gov/pers/EMP/Pages/Employer-Publications/employer-newsletters.aspx>

[Employer Service Center](#)

List of ESC account representatives. <http://www.oregon.gov/pers/EMP/Pages/ESC-Representatives.aspx>

[Employer Training](#)

Information about training courses and links to training materials. <https://www.oregon.gov/pers/emp/Pages/Training.aspx>

[Overview of PERS Benefits for Your Employees](#)

Share this webpage with your new employees to orient them to their new PERS retirement benefits. <https://www.oregon.gov/pers/EMP/Pages/PERS-overview.aspx>

[Actuarial and Financial Reporting Resources for Employers](#)

Links to resources to help you understand your rate, how to reduce it with a side account, and forecast your future rate for budgeting purposes. <https://www.oregon.gov/pers/EMP/Pages/Actuarial-Financial-Information.aspx>

[Contribution Rates](#)

This page contains links to contribution rate information. The Contribution Rates link for the current biennium opens the Summary of PERS Employer Contribution Rates, which lists the rates of all employers for the current and previous biennium. You can find the percentage you pay to PERS to fund the retirement benefits of your Tier One/Tier Two payroll, OPSRP General Service payroll, and OPSRP Police and Fire payroll. <https://www.oregon.gov/pers/EMP/Pages/Contribution-Rates.aspx>

Lists of frequently asked questions, by topic

- [EDX invoice](#) (BEF admin fee, SS fee, wash, downloading invoice) <https://www.oregon.gov/pers/emp/Pages/FAQ-invoice.aspx>
- [EDX reporting](#) (work period dates, unused sick leave, Paid Leave Oregon, eligibility, subject wages, hire intent, reporting death) <https://www.oregon.gov/pers/emp/Pages/FAQ-reporting.aspx>
- [Reporting special circumstances](#) (work after retirement, reporting hours for college/university academic employees, changing IAP contribution type, data verification, domestic partner medical premiums) <https://www.oregon.gov/pers/emp/Pages/FAQ-special.aspx>
- [Reporting leave without pay](#) (when and how to report) <https://www.oregon.gov/pers/emp/Pages/LWOP-FAQ.aspx>
- [Reporting Paid Leave Oregon leave](#) <https://www.oregon.gov/pers/emp/Pages/Paid-Leave-OR-FAQ.aspx>
- [Actuarial topics](#) (MFD #10 rate, PERS rates) <https://www.oregon.gov/pers/emp/Pages/FAQ-actuarial.aspx>
- [PERS topics](#) (joining PERS, PERS complexity) <https://www.oregon.gov/pers/emp/Pages/FAQ-PERS.aspx>
- [Voluntary contributions](#) (starting, stopping, managing voluntary contributions) <https://www.oregon.gov/pers/emp/Pages/FAQ-VC.aspx>

[Payment Categories chart](#)

Chart of different types of payments employees receive and whether they are reported to PERS and subject to contributions.

<http://www.oregon.gov/pers/EMP/Documents/Misc-Documents/Payment-Categories.pdf>

[Web Administrator Agreement Form](#)

The form that a new web administrator must fill out, have signed, and submit to PERS to receive a web admin account.

<http://www.oregon.gov/pers/Documents/Form/425-Web-Administrator-Agreement.pdf>

[How to Fill Out a Web Administrator Agreement Form](#)

Instructions for filling out the form.

<https://www.oregon.gov/pers/emp/Pages/Web-admin-agreement-form-instructions.aspx>

Publications

[Employer News](#). This monthly newsletter provides in-depth information, explanations, and instructions for employer reporters, HR professionals, Benefits departments, and agency heads. Newsletters are [posted to the PERS website](#), and employers are informed of the latest issue by email.

<https://www.oregon.gov/pers/EMP/Pages/Employer-Publications/employer-newsletters.aspx>

[Employer News Bites](#). Occasionally PERS needs to inform employers about a policy or procedure change that cannot wait until the next newsletter. News Bites are sent by email.

[Perspectives](#). *Perspectives* is a newsletter emailed to nonretired and retired members three times a year. It informs and educates members about pertinent PERS news.

To receive *Perspectives*, you need to [sign up for the mailing list through GovDelivery](#).

https://public.govdelivery.com/accounts/ORPERS/subscriber/new?topic_id=ORPERS_68

Reports

[Actuarial valuation reports](#). Every year, PERS publishes actuarial valuation reports for every PERS-participating employer, in addition to a system-wide valuation report. These reports are calculated and created by PERS' consulting actuary based on information gathered the previous year. Reports generated in even years are used to set rates for the next biennium; reports generated in odd years do not affect rates and are just informational.

<https://www.oregon.gov/pers/Pages/Financials/Actuarial-Valuations.aspx>

[PERS Annual Comprehensive Financial Report](#). This annual financial report is published once a year and posted on the PERS website. The report provides a comprehensive review of the financial performance of PERS and the retirement plans it administers for the prior fiscal year.

<https://www.oregon.gov/pers/Pages/Financials/Actuarial-Financial-Information.aspx>

[PERS by the Numbers](#). This annual PERS report includes statistics such as membership and demographic information; retiree benefit information, including monthly benefit payment amounts; PERS system funded status and future projections; and a list of PERS-participating employers by county.

<https://www.oregon.gov/pers/Documents/General-Information/PERS-by-the-Numbers.pdf>

Meetings

Employer Advisory Group (EAG). The EAG meets every three months. The 18-member group provides perspective and insight into PERS policies that affect PERS-participating employers. EAG members ensure that policies are considered from the various employers' perspectives and needs, and they also engage with the employers they represent to foster collaboration in the implementation of policy changes. Employers are welcome to attend the virtual meetings via Microsoft Teams.

Meeting schedules and materials are listed on the [EAG webpage](https://www.oregon.gov/pers/EMP/Pages/Employer-Advisory-Group.aspx).
<https://www.oregon.gov/pers/EMP/Pages/Employer-Advisory-Group.aspx>

PERS Board. The PERS Board meets every other month, and employers are welcome to attend. The five-member board oversees the administration of the PERS system in compliance with state and federal laws. The board appoints an executive director and retains consultants in areas such as legal counsel, actuarial services, and medical advisors to assist in the administration of the system.

Meeting schedules, materials, and instructions for virtual access are listed on the [PERS Board webpage](https://www.oregon.gov/pers/Pages/Board/PERS-Board-Information.aspx).
<https://www.oregon.gov/pers/Pages/Board/PERS-Board-Information.aspx>

Legislative changes

The PERS system is overseen by several government agencies who ensure that the system is financially healthy, affordable, and compliant with Oregon law. The system is:

- Managed by the Oregon State Treasury.
- Overseen by the Oregon Investment Council.
- Set by the Oregon Legislature.
- Managed by the PERS Board.
- Administered by the PERS agency.

This oversight results in adjustments to the PERS system every few years. In fact, since PERS was created in 1946, it has undergone about 90 legislative changes.

Watch the “[How Does PERS Work?](#)” video to understand how PERS is run.



<https://vimeo.com/654717128>

Resources

- **Oregon Administrative Rules (OAR):** According to the Oregon Secretary of State website, “Administrative Rules are created by most agencies and some boards and commissions to implement and interpret their statutory authority (ORS 183.310(9)).” OAR Chapter 459 interprets legislation that governs how PERS is to be run.
<https://secure.sos.state.or.us/oard/displayChapterRules.action?selectedChapter=148>
- **Oregon Revised Statutes (ORS):** The Oregon Revised Statutes are the codified laws of the State of Oregon. The laws established by the Oregon Legislature regarding PERS are Volume 6, Chapters 238 and 238A.
https://www.oregonlegislature.gov/bills_laws/Pages/ORS.aspx
- **Legislation affecting PERS, by year.**
<https://www.oregon.gov/pers/Pages/Legislation/Legislation-Impacting-PERS.aspx>