

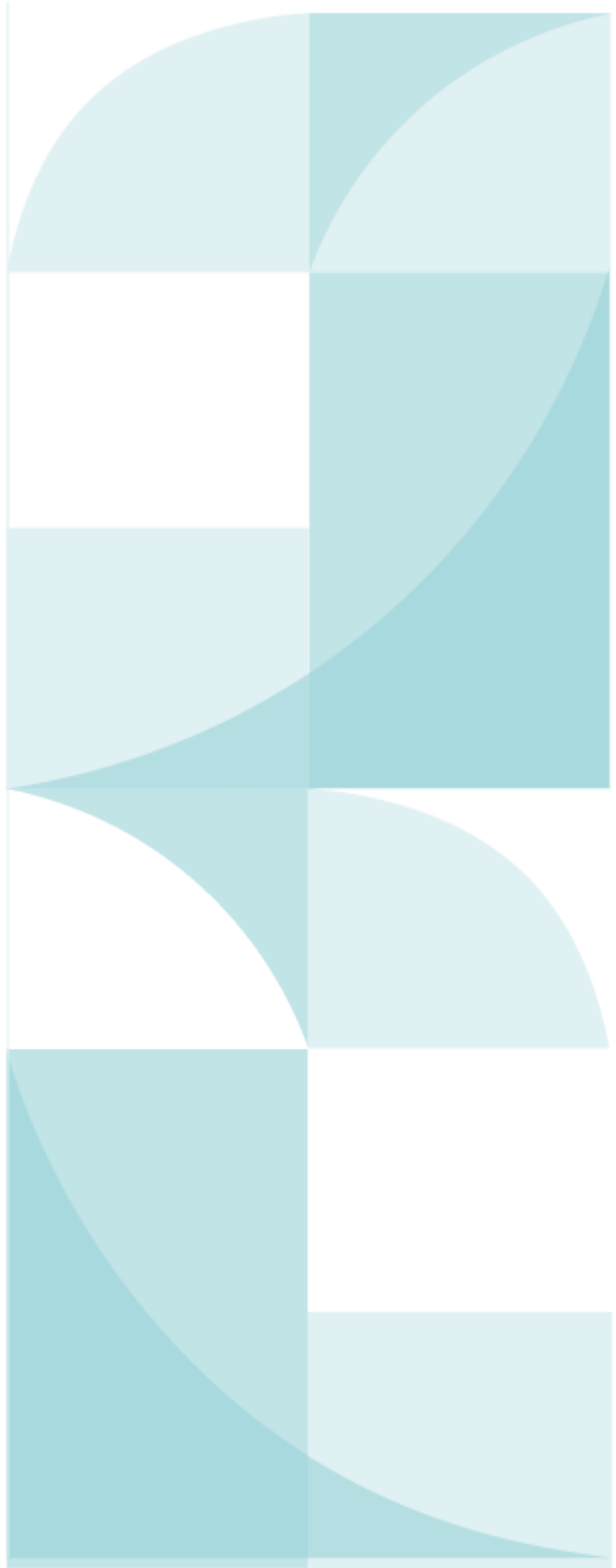


Detail 1 Member Demographics Fields

**Employer Reporting
Quick-Reference Guide**

This guide defines the fields on a Detail 1 Demographics record, which is used to report employee status changes to PERS.

**Employer
Service
Center**



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About the Detail 1 Member Demographics record

The Detail 1 (abbreviated as DTL1 in EDX) Member Demographics record informs PERS about the current state of your work force, which is necessary to evaluate the information you submit with your Detail 2 (DTL2) Wage and Service records. If EDX finds an inconsistency between the demographic status of an employee and the wage and service information submitted, it will produce an error alerting you that you might have to submit demographic change information.

The Detail 1 record is a multi-purpose record. You can make several demographic changes simultaneously on a single record. For instance, if an employee changes his or her name and is also going on leave, you can change both of these demographics on the same record.

Important: Do not create and submit a DTL1 record for each of your employees in every report. Only submit a new DTL1 record for an employee when one or more of following changes occurs:

- Employment status (e.g., hire, termination, employment, or start or end of leave of absence).
- Employee death.
- Name.
- Address.
- Social Security number (because of a clerical error).

Demographic record field descriptions

The following tables define the fields on the Detail 1 record in the order in which they are listed on the EDX screen. Refer to these tables to know which fields are required depending on the change in status or demographic information you are reporting.

Field name	When required	Description
SSN	When reporting a status change (i.e., with all status codes except 00).	Social Security number. Note: When you are correcting an employee's Social Security number because it was reported incorrectly before, use this field to provide the correct SSN.
Status Code	Always.	Type of status change that is being reported (e.g., hire, termination, death, or starting or returning from leave). Use code 00 when changing only demographic information (e.g., name, address, SSN).
Status Date	When reporting a status change (i.e., with all status codes except 00).	Date the work status change became effective. Must be in the format <i>MM/DD/YYYY</i> .
Last Day Service	When reporting a termination or death (status code 02 or 10).	Date work was last performed or the last date of paid leave (such as vacation, sick leave, or compensatory time), whichever is later. The date cannot be later than the termination date. Must be in the format <i>MM/DD/YYYY</i> .
Old SSN	When correcting an SSN.	When correcting an SSN, enter the old, incorrect SSN in this field. A value in this field tells EDX that the SSN is being updated.
First Name	Always.	Employee's first name. Enter in all capital letters. May auto fill if employee already has a PERS account.
Last Name	Always.	Employee's last name. Enter in all capital letters. If employee's name includes a suffix, include in this field. For example, JONES, JR. or SMITH III. May auto fill if employee already has a PERS account.
Middle Name	Optional field.	Employee's middle name or initial.

Continued

DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field name	When required	Description
Name Change Indicator	“Y” (for yes) required when reporting a name change.	Replace the “N” with "Y" if reporting a name change. Otherwise, leave the default of N.
Address – 1	When reporting a new hire (status code 01, 11, 12, or 15), termination (02), death (10), or address change (00).	The employee’s street address, including apartment or unit number, or PO Box. Use all capital letters.
Address – 2	Optional.	Avoid using this field unless you absolutely cannot fit address in Address – 1 field.
Address – 3	Optional.	Avoid using this field.
City	When address is required.	City in which the employee resides. Limit of 28 characters including spaces; abbreviate if needed.
State	When address is required.	US state in which the employee resides. Choose from drop-down list. For instructions on reporting a non-United States address, refer to employer reporting guide 7, Reporting a New Employee , section “Reporting a New Employee,” subsection, “How to Enter an International Address.”
Zip – 1	When address is required.	Five-digit ZIP code for USA address.
Zip – 2	Optional.	Four-digit ZIP code extension for USA address. Do not include a dash.
Province	When Country Code is other than USA.	Province in which the employee resides. Limit of 20 characters including spaces; abbreviate if needed.
Country Code	When address is required.	Country in which the employee resides. Choose from a pull-down alphabetical list. USA is the default.
Postal Code	When Country Code is other than USA.	Postal code for the area in which the employee resides.

Continued

DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field name	When required	Description
Date of Birth	When reporting a new hire (status code 01, 11, 12, or 15).	Employee's date of birth. Type in the format <i>MM/DD/YYYY</i> .
Gender	When reporting a new hire (status code 01, 11, 12, or 15).	You must choose either Female or Male. If needed, gender can be changed to nonbinary/other after report posts, as explained on page 7 of this guide.
PERS Job Class Code	When reporting a new hire (status code 01, 11, 12, 13*, or 15).	The job classification of the employee's position, such as 01 General Service or 09 School Employee. Choose from a pull-down list. Look up job classification codes and their descriptions in quick reference guide EDX Job Class Codes .
Average Overtime Hours	When reporting a new hire (status code 01, 11, 12, 13*, or 15).	The number of annual overtime hours considered average or reasonable for the job class. Choose from a pull-down list. The number sets a cap on how many overtime hours PERS will use to calculate an OPSRP member's final average salary when they retire. Learn more in employer reporting guide 18, Reporting or Changing 'Average Overtime.'
Unused Sick Leave Hours	When reporting a termination (status code 02) or a death (10).	Number of capped sick leave hours PERS should use when calculating the pension of a Tier One or Tier Two employee. The Unused Sick Leave Program only applies to Tier One and Tier Two members. The field is required, however, so for OPSRP members and organizations that do not participate in the program, enter 0. Learn more in employer reporting guide 17, Calculating Unused Sick Leave Hours at Termination or Retirement .
Contract No. of Months	When hiring employee with job class code 09 – School Employee. Other job classes leave the 00 default.	Number of months school employee is contracted to work, regardless of how many months the employee is paid (e.g., if they work for 9 months but are paid over 12 months, choose 09). Choose 00, 09, 10, 11, or 12 from the pull-down list.

Continued

*Status code 13, New Hire – Retiree Return to Service, cancels a retiree's retirement benefits and changes their status from retired to active service. After submitting the Detail 1 record with status code 13, which cancels their retirement, you must submit another Detail 1 record in a separate report with status code 01 - Qualifying New Hire to hire them. Both records should have the same date in the Status Date field, which is the employee's first day working for your organization.

DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field name	When required	Description
Employer Site Distribution Code	Optional.	A field you can use to sort members' annual statements. (Example: For a large employer who has employees at different work sites, use a site distribution code of "A" for the employees at site A, "B" for the employees at site B, and so on.)
Non PERS Data Memo	Optional.	Field you can use to make notes about the record.

Changing gender to nonbinary/other

For employees who do not identify as female or male, follow this process to change their gender.

1. When completing the Detail 1 record to hire them, select Female or Male in the Gender field. It's a required field, so you must select one of these options to get the record to post.
2. Once the record posts, create a Demographic Correction Request (DCR) for that employee.
3. In the Comments box, ask ESC staff to change the employee's gender to nonbinary/other.

For DCR instructions, read [employer reporting guide 20, Creating a DCR](#).

To see this process demonstrated, watch the video "[Reporting a New Employee.](#)"

Reporting a new employee

The Detail 1 fields indicated below are required when reporting a new employee.

Note: Use all capital letters when entering demographic information.

Field name	Required/optional	Example
SSN	Required.	111223333
Status Code	Required.	01 – Qualifying New Hire
Status Date	Required. Note: For part-time or temporary workers not in a qualifying position before 2004, type “01/01/2004” or the actual hire date if later than 01/01/2004.	01/01/2024
First Name	Required. Use all caps.	HOWARD
Last Name	Required. Use all caps.	JOHNSON
Name Change Indicator	Required. “N” is the default.	N
Address – 1	Required. If the employee address includes a unit, apartment, or condo identifier, include that in this field. Use a PO Box instead of a street address if one is available.	1234 MAIN ST. UNIT A-1
Address – 2	Avoid using this field unless you absolutely cannot fit the address in Address – 1.	
Address – 3	Avoid using this field.	
City	Required.	TIGARD

Continued

DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field	Required/optional	Example
State	Required for USA addresses.	OR
Zip – 1	Required for USA addresses.	97224
Zip – 2	Optional.	
Province	Leave blank for USA addresses. When a country other than USA is chosen in the Country Code field, this field becomes required.*	
Country Code	Required.	USA
Postal Code	Leave blank for USA addresses. When a country other than USA is chosen in the Country Code field, this field becomes required.*	
Date of Birth	Required. Format is MM/DD/YYYY.	07/04/1977
Gender	Required. For instructions on changing gender to nonbinary/other, read page 7 in this guide.	Male
PERS Job Class Code	Required. Double check that you are selecting the correct code. If you select the wrong code and the report posts, you will need to submit a Demographic Correction Request to have PERS change it to the correct code.	01
Average Overtime Hours	Required. Select the number of annual overtime hours an OPSRP position will be expected to work. For other tiers and retirees, enter 0. Learn more in employer reporting guide 18, Reporting or Changing 'Average Overtime.'	100

*For instructions on entering a non-USA address, read [employer reporting guide 7, Reporting a New Employee](#), section “Reporting a New Employee,” subsection “How to Enter an International Address.”

Reporting an employee termination or death

The Detail 1 fields indicated below are required when reporting an employee’s termination or death.

Note: Reporting a status code 10 will report an employee’s death and terminate the employment segment simultaneously. You do not need to submit two records.

Field name	Required/optional	Example
SSN	Required.	111223344
Status Code	Required. Use status code 02 to report an employee leaving because of quitting, getting a new job, being let go, ending a job segment, or retiring. Use code 10 to report an employee’s death.	02 – Terminated
Status Date	Required. If the employee died while still employed, this would be their date of death. If employee is leaving their job, this would be the first day that they are no longer employed in that position.	01/16/2024
Last Day Service	Required. The last date the employee actually worked or was on paid leave (e.g., if the employee was on vacation from 1/8/24–1/15/24 and 1/16 was their first day in a new job, you would enter “01/15/2024”). The date can be the same as the Status Date but cannot be later than the Status Date.	01/15/2024
First Name	Required. Enter in all caps.	STUART
Last Name	Required. Enter in all caps.	APPLEBY
Name Change Indicator	Required. “N” for No is the default.	N

Continued

DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field name	Required/optional	Example
Address – 1	Required. If the employee address includes a unit, apartment, or condo identifier, include it in this field. Use a PO Box instead of a street address if one is available.	110 MAIN STREET APT 1C.
Address – 2	Avoid using this field unless you absolutely cannot fit the address in Address – 1.	
Address – 3	Avoid using in this field.	
City	Required.	ALOHA
State	Required for USA addresses.	OR
Zip - 1	Required for USA addresses.	97007
Zip - 2	Optional. If their address includes a four-digit ZIP-code extension, enter it here.	2052
Province	Required for non-USA addresses.	
Country Code	Required. Choose from drop-down list. USA is the default.	USA
Postal Code	Required for non-USA addresses.	
Unused Sick Leave Hours	Required. Number of capped sick leave hours PERS should use when calculating the pension of a Tier One or Tier Two employee. The Unused Sick Leave Program only applies to Tier One and Tier Two members. The field is required, however, so for OPSRP members and organizations that do not participate in the program, enter 0. Learn more in employer reporting guide 17, Calculating Unused Sick Leave Hours at Termination or Retirement.	10.5

Reporting an employee leave-without-pay segment

Beginning the leave

When an employee begins a leave without pay (LWOP), create a Detail 1 record with values in the required fields. If you know the date of the end of the leave, report that in a separate report. Report earned wages in a separate report.

Field name	Required/optional	Example
SSN	Required.	111223334
Status Code	Required. Select the code for the type of leave the employee is taking (03, 04, 05, 06, 07, or 09). Learn more in employer reporting guide 11, Reporting a Leave .	03 – On Family Leave
Status Date	Required. The first day of the leave.	01/15/2024
First Name	Required.	JOAN
Last Name	Required.	ARC
Name Change Indicator	Required. “N” is the default.	N

Ending the leave

When the employee returns from LWOP, create a Detail 1 record with required fields filled in.

Field name	Required/optional	Example
SSN	Required.	111223334
Status Code	Required.	08 – Return from Leave
Status Date	Required. The employee’s first day back on the job or on paid leave or holiday.	01/30/2024
First Name	Required.	JOAN
Last Name	Required.	ARC
Name Change Indicator	Required. “N” is the default.	N

Reporting an employee change of address

The fields indicated below are required when reporting an employee's new address.

Field name	Required/optional	Example
SSN	Required.	111223336
Status Code	Required. 00 status code tells EDX there is no change in employment status; only personal information is being changed.	00 – No Change in Status
First Name	Required.	JOSE
Last Name	Required. Enter new last name. In this example, employee is changing his name and address.	NEW-YORK
Name Change Indicator	Required. “N” is the default. Enter “Y” to change employee’s name. This example demonstrates the ability to change an employee’s name and address in the same record (e.g., when an employee’s name and address change because of a marriage).	Y
Address – 1	Required. Enter the new address. If address includes a unit, apartment, or condo identifier, include the number in this field. If address is a PO Box, enter it in this field.	1234 NORTH ST.
Address – 2	Avoid using this field unless you absolutely cannot fit the address in Address – 1.	

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DETAIL 1 MEMBER DEMOGRAPHICS FIELDS

Field name	Required/optional	Example
Address – 3	Avoid using this field.	
City	Required. Enter new city, if applicable.	OREGON CITY
State	Required for USA addresses. Choose new state, if applicable.	OR
Zip – 1	Required for USA addresses. Enter new five-digit ZIP code, if applicable.	97045
Zip – 2	Enter four-digit ZIP code extension, if available.	2747
Province	Leave blank for USA addresses. When a country other than USA is chosen in the Country Code field, this field becomes required.*	
Country Code	Required. Choose from drop-down list. USA is the default.	USA
Postal Code	Leave blank for USA addresses. When a country other than USA is chosen in the Country Code field, this field becomes required.*	

*For instructions on entering a non-USA address, read [employer reporting guide 7, Reporting a New Employee](#), section “Reporting a New Employee,” subsection “How to Enter an International Address.”

Reporting an employee name change

To change an employee's name (e.g., when an employee gets married or divorced or legally changes their name for any reason), create a Detail 1 demographic record with required fields filled in.

Field name	Required/optional	Example
SSN	Required.	111223337
Status Code	Required. 00 status code tells EDX there is no change in employment status; only demographic information is being changed.	00 – No Change in Status
First Name	Required. Enter the new name, if applicable. Use all capital letters.	MARY
Last Name	Required. Enter new name, if applicable. Use all capital letters.	CONTRARY
Name Change Indicator	Required. Type "Y" to indicate a name change.	Y

Correcting an employee’s Social Security number (SSN)

To correct a clerical error to an employee’s SSN, create a Detail 1 demographic record with required fields completed, as shown below.

Field name	Required/optional	Example
SSN	Required. Enter correct SSN.	111223338
Status Code	Required. This code tells EDX there is no change in employment status; only demographic information is changing.	00 – No Change in Status
Old SSN	Required. Enter previous, incorrect SSN.	111224448
First Name	Required. Use all caps.	LASHAWN
Last Name	Required. Use all caps.	EMPLOYEE
Name Change Indicator	Required. Leave the default of N unless changing employee’s name.	N

Discovering an employee has two accounts under different SSNs

If you discover that an employee has two PERS accounts under different SSNs, do not submit a Detail 1 record to correct the SSN. Instead, inform your Employer Service Center representative of the error by submitting a Demographic Correction Request (DCR).

Creating the DCR

Follow the instructions in [employer reporting guide 20, Creating a Demographic Correction Request](#), section “How to Create a DCR.”

The only field you need to fill in is the Comments field, in which you will explain that you have discovered two accounts under two different SSNs for the same employee.

Indicate which SSN is correct and which is incorrect and what document you used to confirm this. If you do not know which is correct, then say so.

Correcting posted demographic records

If you post a Detail 1 demographic record with a mistake in it, you might be able to create and submit another Detail 1 record to correct it, depending on the type of error.

To correct the following types of typographical errors, submit a new Detail 1 record with a status code of 00 – No Change in Status and the correct information:

- Social Security number. (Enter correct number in SSN field and incorrect number in Old SSN field.)
- First and/or last name. (Change the Name Change Indicator field to Y.)
- Address.
- Gender. (Only to switch from male to female or vice versa.)

To correct errors in any other fields in a Detail 1 record, you must ask Employer Service Center staff to make the correction. The process for making this request is to submit a Demographic Correction Request (DCR) through EDX. For instructions, read [employer reporting guide 20, Creating a Demographic Correction Request](#).