Viewing **Employee Information**

Employer Reporting Guide

This guide explains how to use the View Employee Info function to find employee address, salary, and voluntary-contribution information.

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October 2024

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Introduction

The View Employee Information (Info for short) EDX function enables you to access an employee's PERS history, including their start date, job class, and PERS plan. It also shows if they are participating in voluntary contributions to their Individual Account Program (IAP) account.

For an explanation of voluntary contributions, read employer reporting guide 19, *Completing Work List Requests*, section "IAP Voluntary Contribution Request."

Accessing the View Employee Information options

1 Select View Employee Info in the EDX Site Navigation menu.

2 Enter the last name, Social Security number, or PERS ID of the employee in the appropriate field. Click **Search** or tap your Enter key.

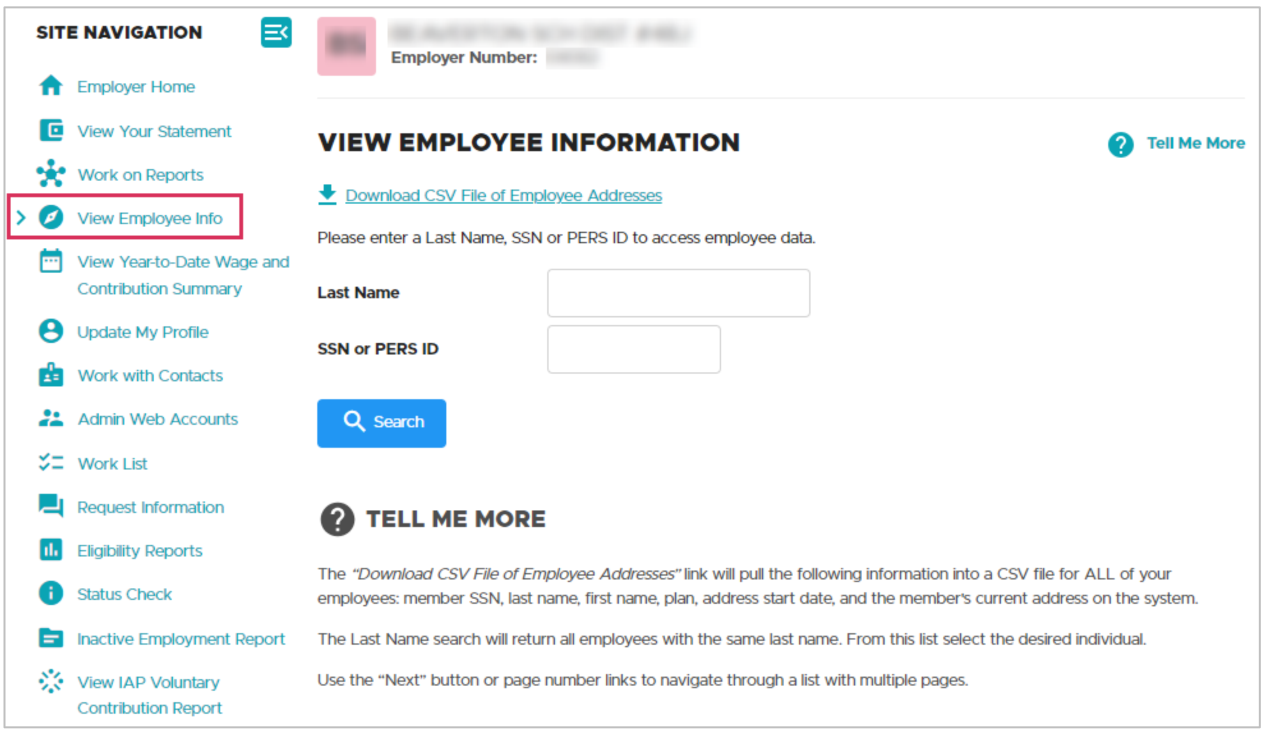


Figure 1. View Employee Information main screen

3 On the next screen, click the Social Security number of the employee about whom you need information.

This opens a screen with five tabs. Read the remaining sections in this guide to learn what you can do on each tab.

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

Employment History

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

The View Employee Information function always opens to the Employment History tab first. Employment History contains 14 categories of information running horizontally across a very wide screen. If an employee has worked for more than one employment segment for the same employer, their employment history can have more than one line.

Below is an image of the screen split in two parts for easier viewing. Descriptions of each category under Employment History are on the next page.

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

EMPLOYMENT HISTORY

Hire Intent	Start Date	Last Day Service	Term/End Date	Gross Unused Sick Leave	Transferred Unused Sick Leave	Job Class
Q	08/29/2022					
	08/29/2022					School Employee

Verify All | Save | Cancel

Figure 2a. Sample Employment History screen (left side)

Position Type	Plan	Average OT Hours	Contract No. of Months	Verify	Verified Date	User ID
Active Service	OPSRP	2000	09	☐		

Figure 2b. Sample Employment History screen (right side)

Employment History field definitions

Field	Definition
Hire Intent	The employer establishes whether a position is intended to qualify for PERS benefits or not. If the position will require 600 or more hours of work in a calendar year, the hire intent is qualifying (Q). If the position will require fewer than 600 hours a year, the hire intent is nonqualifying (NQ). If a nonqualifying position exceeds what was required, the job position type will need to change to "active service," but the original hire intent will not change.
Start Date	The employee's first day on the job, in training, or in onboarding with your organization.
Last Day Service	If employee was reported as terminated, this would be their last day of hours worked on the job or paid leave with your organization.
Term/End Date	If employee was terminated, this is the date on which the employee/employer relationship ended. This date can be the same as or after the Last Day of Service but cannot be before the Last Day of Service.
Gross Unused Sick Leave	If employee was terminated, this is the total amount of unused sick leave hours in their account, minus any reinstated or transferred-in unused sick leave hours. Learn more about calculating unused sick leave hours for a Tier One/Tier Two member in employer reporting guide 17, *Calculating Unused Sick Leave Hours at Termination or Retirement*.
Transferred Unused Sick Leave	Sick leave hours transferred in from a previous employer, if any.
Job Class	The employee's PERS job classification. There are eight job classifications. The three most common are General Service, School Employee, and Police and Fire. To read definitions of all eight job classifications, refer to employer quick reference guide, *EDX Job Class Codes*.
Position Type	The qualification status of the employee's current position with you: either Active Service, Non-Qualifying, or Retiree.
Plan	The employee's PERS membership plan: Tier One, Tier Two, or Oregon Public Service Retirement Plan (OPSRP).

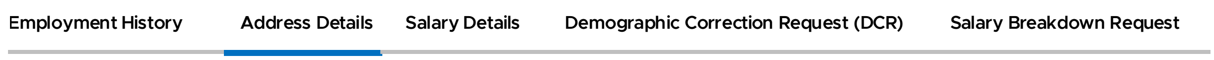
Continued

Field	Definition
Average OT Hours	The average overtime hours that the employee's classification type is expected to work each calendar year. The number is selected by the employer when filling in the employee's new hire record for PERS. Learn more about average overtime in employer reporting guide 18, *Reporting or Changing 'Average Overtime.'*
Contract No. of Months	How many months in a year a school employee (job class 09) is expected to work for their education employer. This is the number of months they work, not the number of months over which they are paid. The options are 09, 10, 11, and 12. An employee whose job class is other than 09 should always have the 00 default.
Verify	A checked Verify box means that the employer has confirmed that all data listed is correct. Verifying data is not usually done until it is requested by a data verification, but an employer can verify data at any time. Do not check the Verify box if you intend to make changes to the employment or position associated with that checkbox. If changes are needed, submit a Demographic Correction Request (DCR) to ask PERS to make the necessary changes.
Verified Date	The date on which the employer finished verifying the data.
User ID	The EDX user ID of the person who verified the employment data.

Employment History button definitions

Button	Use
Verify All	When you're doing a data verification, the Verify All button checks the Verify box for all position segments. You can use this if you have reviewed all positions and they match your records. If a member worked for you and withdrew their account or lost membership because of five years of inactivity, their position will display but the Verify box will be disabled.
Save	Clicking the Save button saves all changes to this screen only. You can verify some positions, save, and come back later to complete your work if necessary.
Cancel	Clicking the Cancel button clears all changes made since your last save and returns you to the Search screen with your last search results retained.

Address Details



The Address Details tab allows you to view the mailing address that PERS has on file for an employee.

The start date for the address is the date the address was entered or last updated.

Employers can only update an address for an employee who has current active employment with them (i.e., they were not terminated). Once an employee is retired, the employer cannot update their mailing address. After retirement, it is up to the retiree to keep their address current with PERS.

If the address shown on the Address Details screen does not match the address you have on file for an active employee, check with the employee to ensure you have their correct address.

If the address on the Address Details screen is wrong, submit a Detail 1 Member Demographics Record with a status code of 00 - No Change in Status. Enter the new address. A status date is not required on this type of record because EDX will assign an effective date on which the record is submitted as the start date for the address. For more detailed instructions, read employer quick reference guide, *Detail 1 Member Demographics Fields*, section “Reporting an Employee Change of Address.”

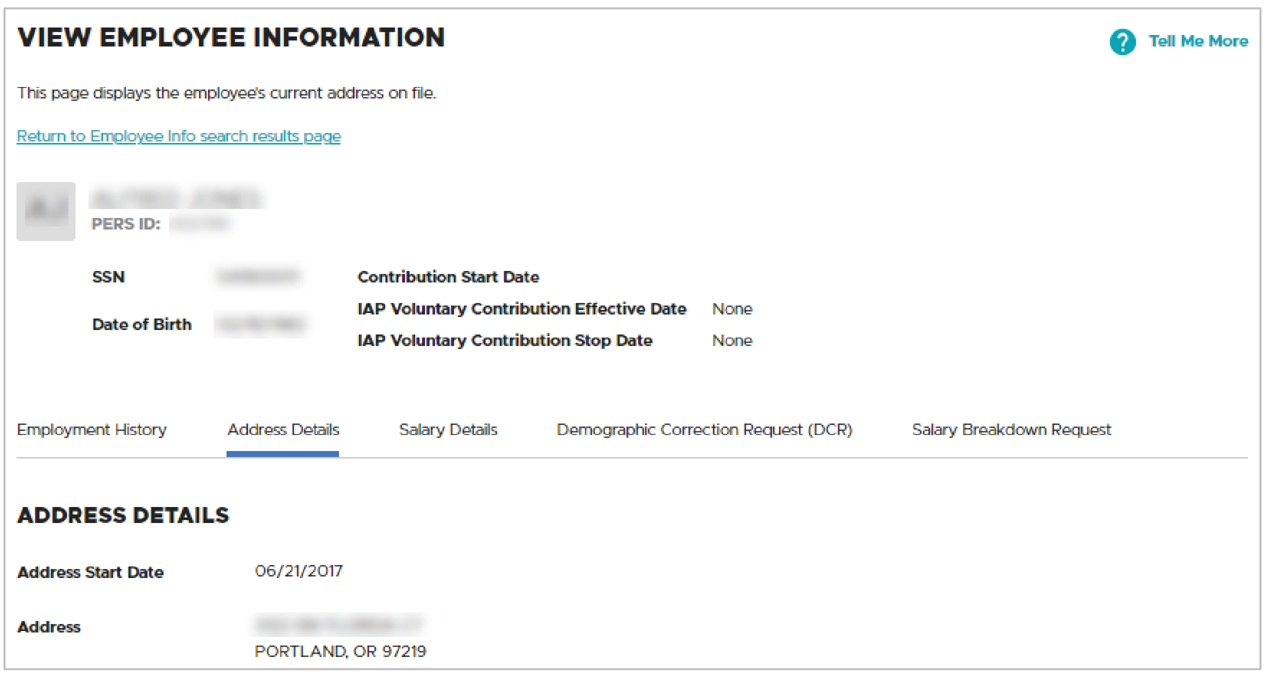


Figure 3. Address Details sample screen

Salary Details

Use this tab when you need to check if an employee is participating in voluntary contributions, or you need to verify an employee's salary.

Voluntary contributions

Voluntary contributions are a product of the Employee Pension Stability Account (EPSA). Introduced in 2020, the EPSA is a way to help reduce employers' rising contribution rates and enable employees to contribute to their pension costs.

Employees who earn over a certain amount per month have a percentage of their 6% IAP contribution redirected into their EPSA. When they retire, that money is used to help fund their pension. Find the salary threshold in effect for each year on the EPSA webpage under "Does EPSA Apply to Every PERS Member?".

The amount redirected into the EPSA is 2.5% for Tier One and Tier Two, 0.75% for OPSRP.

The remaining 3.5% or 5.25% is deposited into the employee's IAP.

Members who make EPSA contributions can choose to make an additional, after-tax contribution into their IAP that is equal to the exact amount being redirected into their EPSA: 2.5% for Tier One and Tier Two, 0.75% for OPSRP. This option, called a "**voluntary contribution,**" allows members to continue receiving 6% of salary in their IAP account.

You can check if an employee is making voluntary contributions by going to the Salary Details tab of the View Employee Info function. On the Salary Details screen, look for a date next to **IAP Voluntary Contribution Effective Date** and check for a stop date.

PERS charges employers for employees' voluntary contributions. It appears on your statement as IAP Voluntary Contributions. Learn more on the How to Manage an Employee's Voluntary Contribution webpage and in employer reporting guide 26, *Understanding Your Statement*.

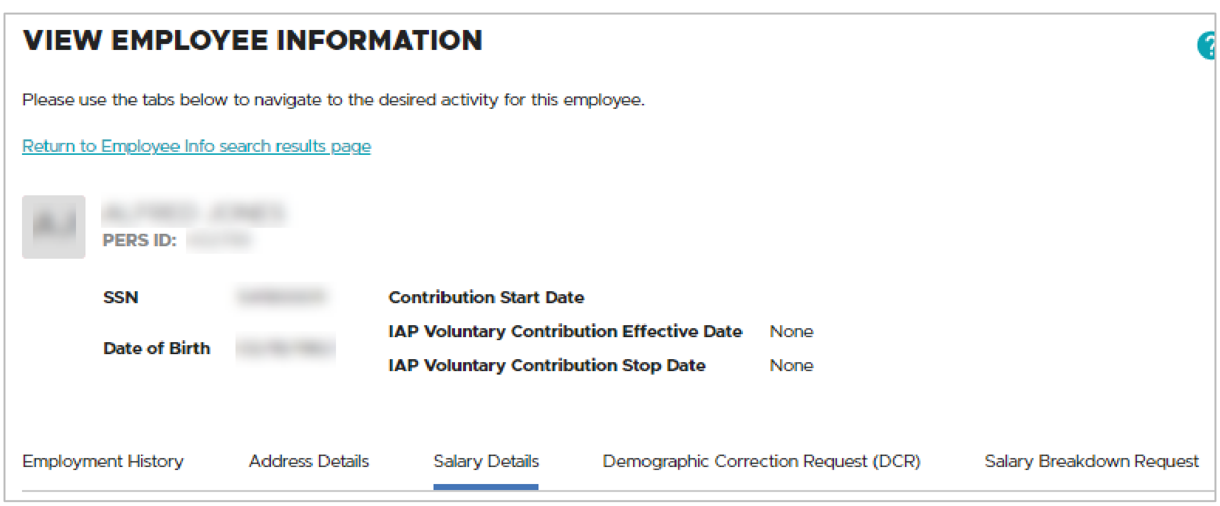
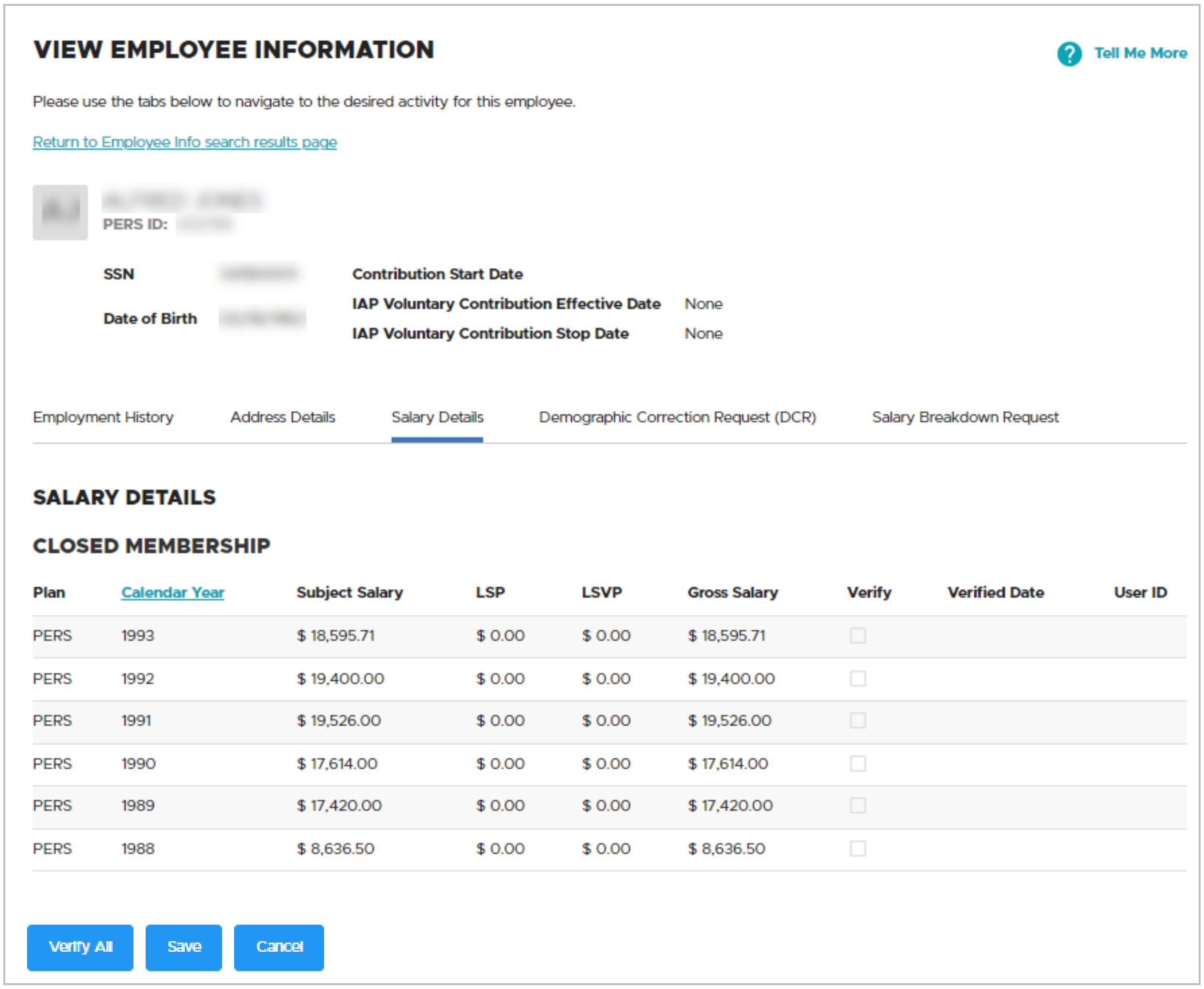


Figure 4. View IAP voluntary contribution participation status

Salary verification

The employee's salary for the date range you entered on the first screen is displayed at the bottom of the Salary Details screen. If the salary for the year in question is correct, select the **Verify** box. If all salary years are correct, select the **Verify All** button. Go to next page in this guide to read what to do if salary is not correct.



VIEW EMPLOYEE INFORMATION

Tell Me More

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

Return to Employee Info search results page

PERS ID:

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

CLOSED MEMBERSHIP

Plan	Calendar Year	Subject Salary	LSP	LSVP	Gross Salary	Verify	Verified Date	User ID
PERS	1993	$ 18,595.71	$ 0.00	$ 0.00	$ 18,595.71	☐		
PERS	1992	$ 19,400.00	$ 0.00	$ 0.00	$ 19,400.00	☐		
PERS	1991	$ 19,526.00	$ 0.00	$ 0.00	$ 19,526.00	☐		
PERS	1990	$ 17,614.00	$ 0.00	$ 0.00	$ 17,614.00	☐		
PERS	1989	$ 17,420.00	$ 0.00	$ 0.00	$ 17,420.00	☐		
PERS	1988	$ 8,636.50	$ 0.00	$ 0.00	$ 8,636.50	☐		

Verify All | Save | Cancel

Figure 5. Salary Details verification sample screen

Correcting salary

If the salary is not correct, do not select the Verify box for that year. Instead do the following:

- If the incorrect salary is prior to 2004, click Create Salary Breakdown Request and create a Salary Breakdown form with the correct salary information. (Learn more in the "Salary Breakdown Request" section in this guide.)
- If the incorrect salary is after 2004, submit a Detail 2 record with an adjustment wage code to correct the salary by pay period. Adjustment wage codes are:
  - 02 Regular/Non-Qualifying (also used as positive adjustment).
  - 05 Positive Adjustment.
  - 06 Negative Adjustment.
  - 14 Negative Adjustment/No Contributions.
  - 18 Negative Adjustment Retiree Wage – ER Rate.

Read definitions of each adjustment wage code in quick reference guide *EDX Wage Codes*.

- If a change is made to the account after you check the Verify box and before PERS locks the data, the system will remove the checkmark. You will need to repeat the verification of the salary year that changed.

Clicking the **Save** button will save all changes to this screen only. If you received a Work List request to verify salary, you would need to return to the Work List, navigate to the Work List item for that employee, and indicate that you have verified all required items.

Note: The Subject Salary field for calendar years before 2004 may include the employer paid pre-tax (EPPT) member contributions.

Demographic Correction Request

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

Demographic Correction Request (DCR) History

If a Demographic Correction Request (DCR) has been submitted to PERS about this employee, there will be a DCR listed in this section. Clicking the status will open the DCR that was submitted to, or returned by, PERS.

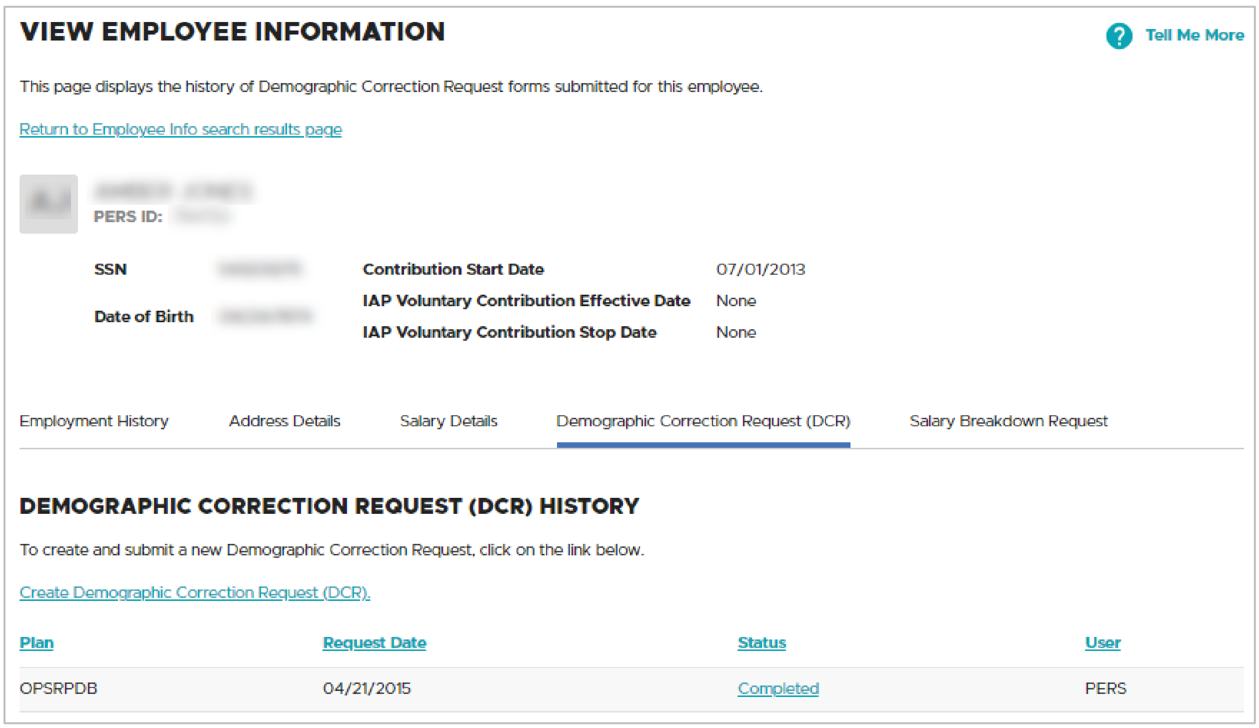


Figure 6. Sample Demographic Correction Request (DCR) History screen

Note: Under the Plan column, the DB after OPSRP stands for "defined benefit." This refers to the pension part of PERS retirement benefits. The other part of a PERS member's retirement benefits is the Individual Account Program (IAP). Learn more about PERS retirement benefits in employer reporting guide 1, *Overview of PERS*.

DCR Status

The Status column will display one of the following statuses:

Completed: The DCR was completed.

Ready for Review: The DCR has been submitted to PERS but not yet processed.

Returned: The DCR was submitted to PERS and PERS returned it because of a discrepancy. The employer reporter needs to correct the discrepancy and resubmit the DCR.

DEMOGRAPHIC CORRECTION REQUEST (DCR) HISTORY

To create and submit a new Demographic Correction Request, click on the link below.

Create Demographic Correction Request (DCR).

Plan	Request Date	Status	User
OPSRPDB	06/11/2012	Completed	PERS
OPSRPDB	11/10/2015	Ready for Review	
OPSRPDB	03/15/2019	Returned	

Figure 7. DCR History

New DCR

Click Create Demographic Correction Request (DCR) to create a new DCR.

DEMOGRAPHIC CORRECTION REQUEST (DCR) HISTORY

To create and submit a new Demographic Correction Request, click on the link below.

Create Demographic Correction Request (DCR).

Figure 8. Create new DCR

Salary Breakdown Request

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

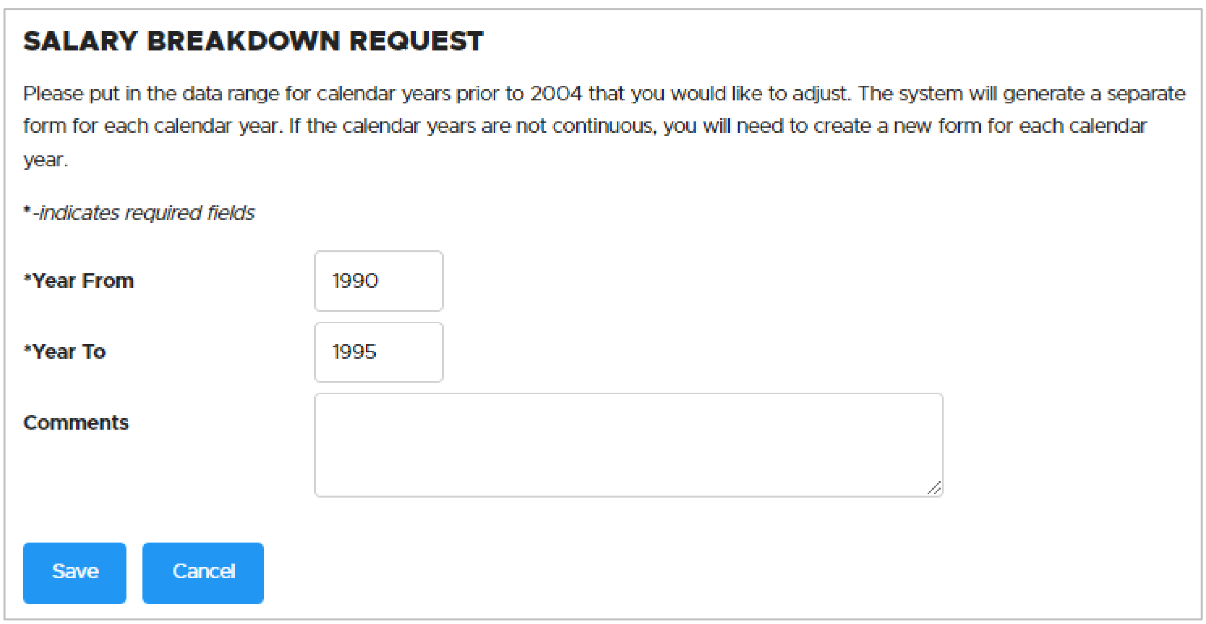
The purpose of the Salary Breakdown Request is for PERS to gather missing employment, salary, or contribution data for an employee for a year or years before 2004.

1. Enter year or years of incorrect or missing salary.

To fill out a Salary Breakdown Request form, enter the first year that is incorrect or missing from the employee's account in the Year From field and the last year that is incorrect or missing in the Year To field. To correct one year, enter the same year in both fields.

Ensure that you create salary breakdowns only for the years you need. If you create one for an incorrect year, contact your ESC representative and ask them to remove it from your Work List. ESC representatives are listed on the Employer Service Center webpage.

Click **Save**.



SALARY BREAKDOWN REQUEST

Please put in the data range for calendar years prior to 2004 that you would like to adjust. The system will generate a separate form for each calendar year. If the calendar years are not continuous, you will need to create a new form for each calendar year.

*-indicates required fields

*Year From: 1990

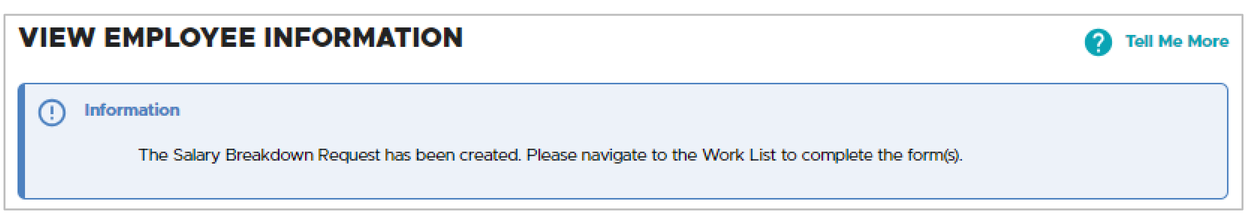
*Year To: 1995

Comments

Save | Cancel

Figure 9. Sample Salary Breakdown Request screen

A confirmation message appears.



VIEW EMPLOYEE INFORMATION

Tell Me More

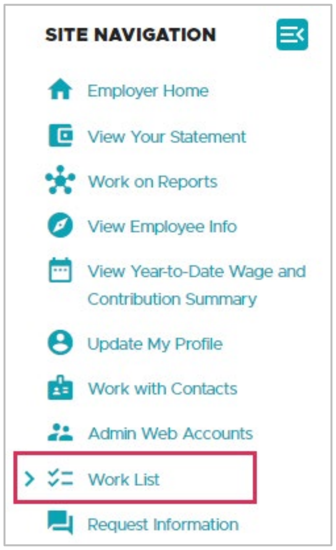
Information

The Salary Breakdown Request has been created. Please navigate to the Work List to complete the form(s).

Figure 10. Salary breakdown request confirmation

2. Go to Work List.

To navigate to the Work List, go to the EDX Site Navigation menu and select Work List.



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

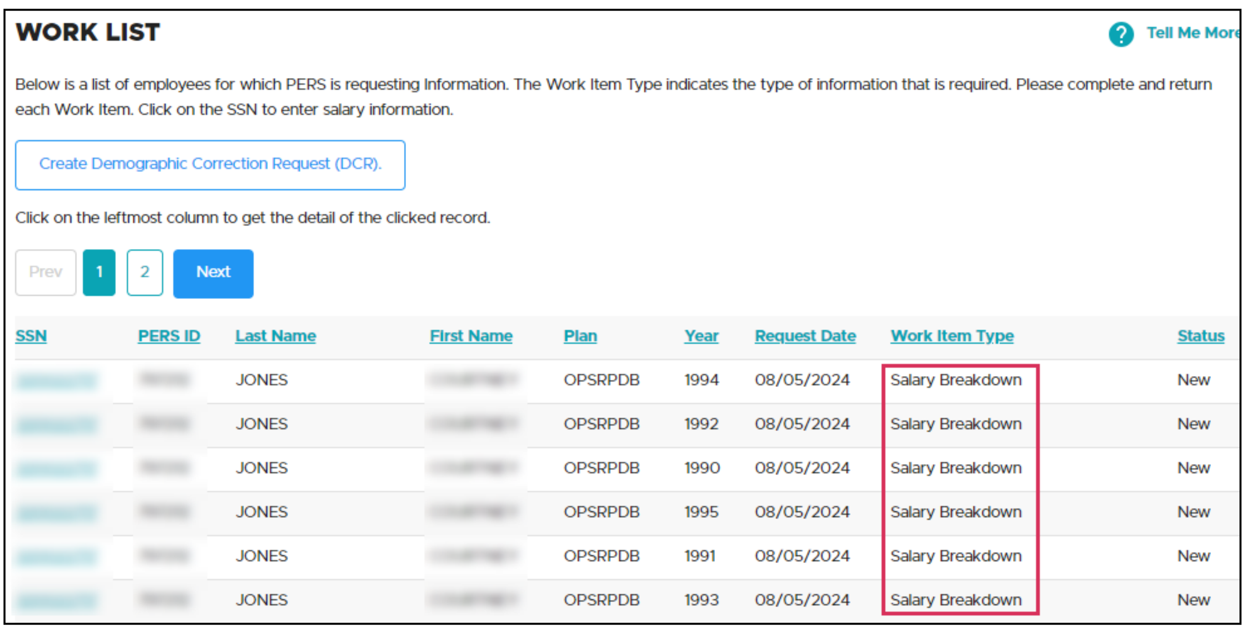


Figure 11. Sample Work List screen

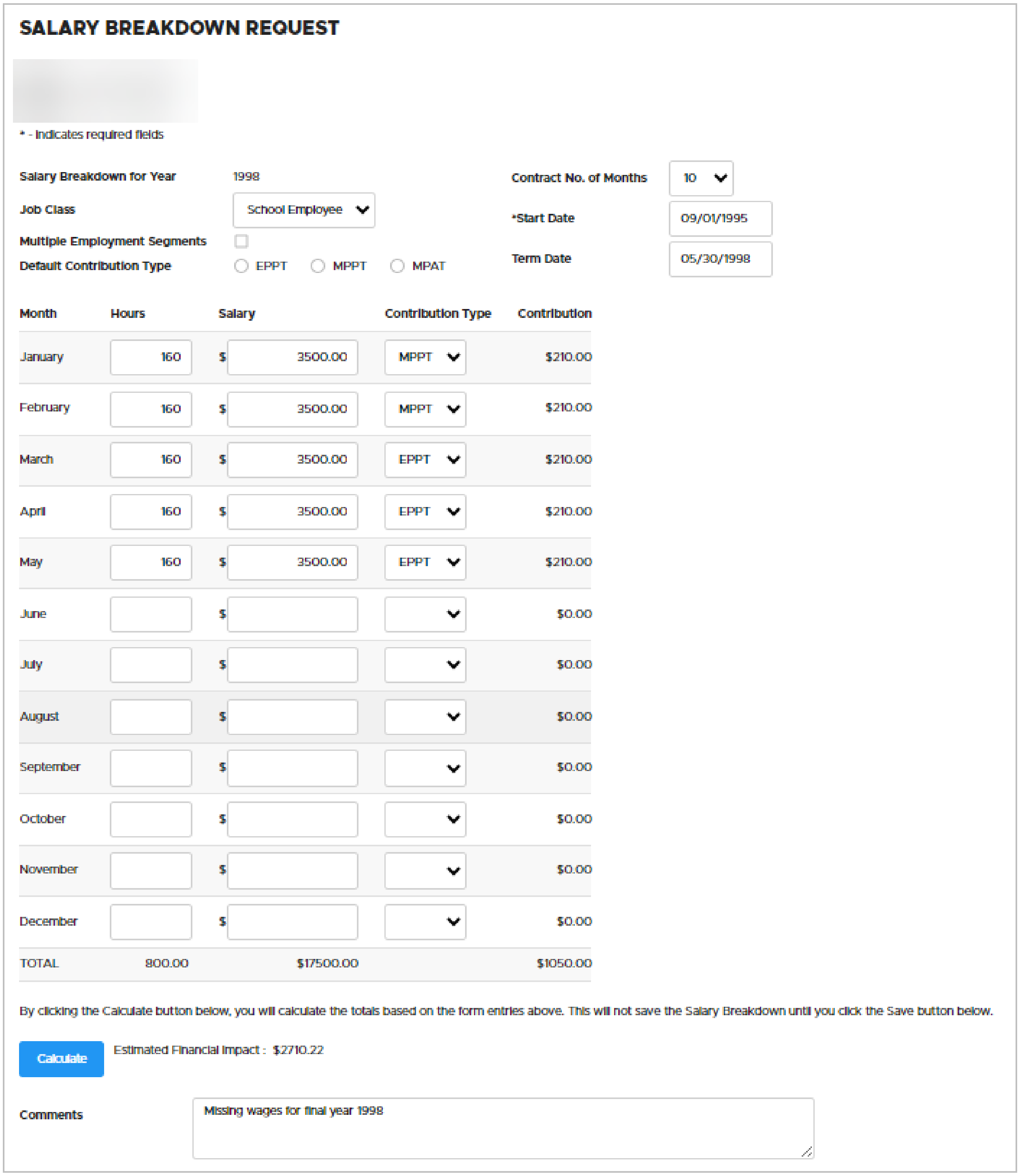
3. Locate Salary Breakdown Work Item.

Click the name of the Work Item Type column to sort Work Lists alphabetically by work item type. Click through the pages (if necessary) to find the Salary Breakdown items.

Find the employee for whom you created a salary breakdown request. Click their SSN on the line of the first year you want to correct.

4. Fill out Salary Breakdown Request form.

Below is a sample of a filled-out Salary Breakdown Request form. The next few pages explain what the fields on the form mean and how to fill out each section of the form.



SALARY BREAKDOWN REQUEST

* - Indicates required fields

Salary Breakdown for Year	1998	Contract No. of Months	10
Job Class	School Employee	*Start Date	09/01/1995
Multiple Employment Segments	☐	Term Date	05/30/1998
Default Contribution Type	○ EPPT ○ MPPT ○ MPAT		

Month	Hours	Salary	Contribution Type	Contribution
January	160	$ 3500.00	MPPT	$210.00
February	160	$ 3500.00	MPPT	$210.00
March	160	$ 3500.00	EPPT	$210.00
April	160	$ 3500.00	EPPT	$210.00
May	160	$ 3500.00	EPPT	$210.00
June		$		$0.00
July		$		$0.00
August		$		$0.00
September		$		$0.00
October		$		$0.00
November		$		$0.00
December		$		$0.00
TOTAL	800.00	$17500.00		$1050.00

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 : $2710.22

Comments: Missing wages for final year 1998

Figure 12. Sample Salary Breakdown Request form

Employment information for job year

Fill in the appropriate fields about the employment year, as explained in the table below.

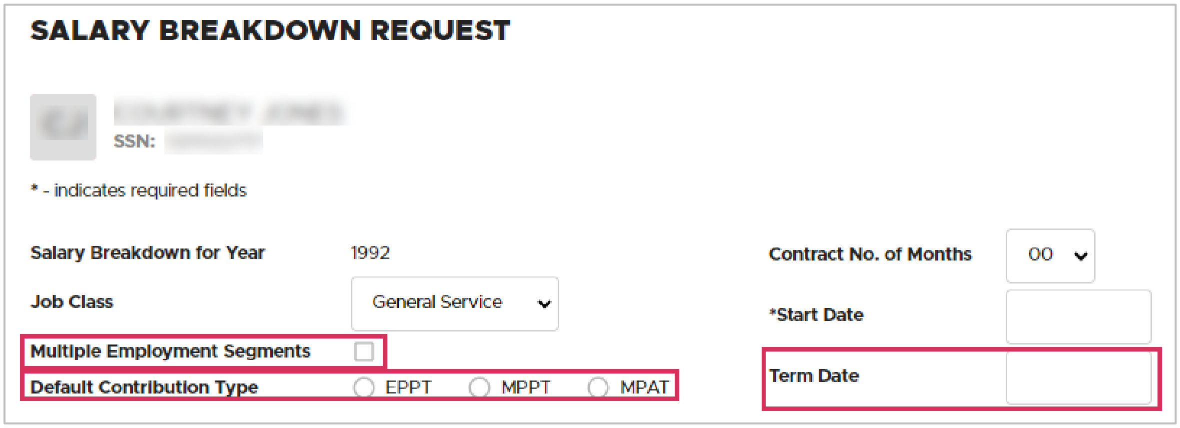


Figure 13a. Salary Breakdown Request form: top section

Field	Description
Salary Breakdown for Year	The year for which the salary breakdown is requested.
Job Class	The Job Class field defaults to General Service. If the job classification you have on record does not match PERS records or if the employee changed job class during the year in question, include employment history in the Comments box at the bottom of the screen.
Multiple Employment Segments	Check this box if the employee was hired or terminated more than once that year. Provide all employment dates for the year in the Comments box at the bottom of the screen. If the Multiple Employment Segments box is not checked and there are gaps in the employee's employment, explain why in the Comments box.
Default Contribution Type	If the IAP contribution type is the same for the entire calendar year, click the box next to the contribution type — either employer-paid pretax (EPPT), member-paid pretax (MPPT), or member-paid after-tax (MPAT). This will populate the Contribution Type fields on the rest of the form with that contribution type. If the employee had more than one contribution type in that year, choose the contribution type individually for that month or months.

Continued

Field	Description
Contract No. of Months	The field defaults to 00. If your employee is in job class School Employee, use the drop-down menu to select the correct number of months that the employee was contracted to work that year. If the number does not match PERS records, select the correct number and explain the reason for the discrepancy in the Comments box at the bottom of the screen. If your employee was not a school employee, this field must show 00.
Start Date	This is a required field. It is the date the employee started working for the employer.
Term Date	Enter the employee's termination date if they terminated with you.

Salary information by month

The next section of the Salary Breakdown Request form breaks down the salary and hours by month. A sample of an entire form is shown on page 15 of this guide.

Field	Description
Month	Each calendar month of the year.
Hours	The number of hours the employee worked in the calendar month for which you are correcting data. Includes paid leave such as sick leave or vacation but does not include unpaid leave. You do not need to fill in hours for every month.
Salary	The subject salary the employee was paid that month (for Tier One/Tier Two members, all salary is subject salary).
Contribution Type	If you clicked the Default Contribution Type button above, you do not have to fill in hours and salary for every month — only enter data for the months worked. If employee had more than one contribution type that year, enter the contribution type for each month.

Calculate

After completing the form, click **Calculate** to view 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 based upon the actual eligibility determination made by PERS.

Notes: No contributions are due for periods of wait time or nonqualifying service.

Each month of corrected or missing wages will be posted with the 15th pay date for that month's data submitted on the Salary Breakdown form.

If invoice is due, pre-2004 charges only show under pension fund type on an employer statement. The invoice description is Eligibility Review for employer rate contributions and Prior Year Earnings for IAP contributions.

Save options

Clicking **Save** with the radio button selected for “Save work in progress” will save your entered data but not submit the record. The record will remain on the Work List in a Pending status.

Clicking **Save** with the radio button selected for “I certify the above to be correct to the best of my knowledge” saves your entered data and submits the record to PERS for review. The record is removed from your Work List.

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

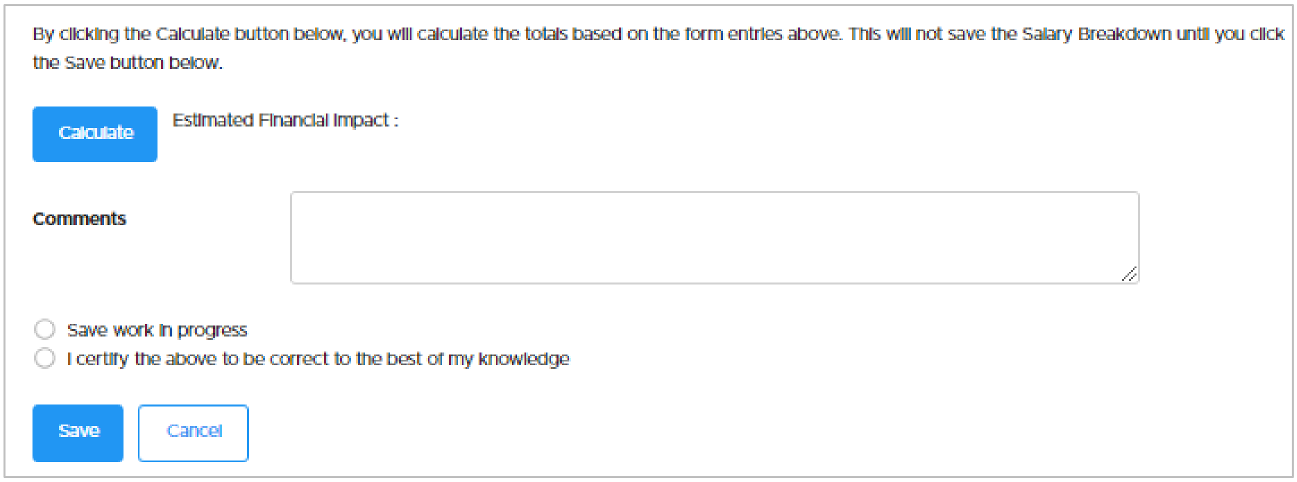


Figure 13b. Salary Breakdown Request Calculate, Save, and Cancel buttons