

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Employer Outreach Spring 2024

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Employer Service Center**



Agenda

- Superhero Gold Star Awards
- PERS spring cleaning
- PERS retirees
- Employer support
- Questions and answers

Superhero Gold Star Awards

Superhero Gold Star Awards

713 winners

You're making a difference!

- ESC started this award in 2016 with 492 Gold Stars awarded.
- We awarded **713** awards for 2023.
 - Nearly 80% of all employer reports.
- Up 61% from prior year (436 awarded in 2022).



You did it!

The graphic features the phrase "You did it!" in a celebratory, handwritten-style font. "You" is in black, and "did it!" is in a golden-yellow color. The text is surrounded by several starburst shapes, some in black and some in golden-yellow, creating a festive and congratulatory atmosphere.

PERS spring cleaning

- Running reports
- Inactive Employment report
- Lists and forms

PERS spring cleaning

Running reports

Report name	Information it provides
Inactive Employment	Employees for whom you haven't reported wages in at least the last three months.
Eligibility	Employees whose eligibility to earn PERS benefits may have changed.
Year-to-Date Wage and Contribution	Employee wages and contributions paid on those wages for a calendar year.
Status Check	<p>Status of employees for whom PERS is expecting contributions. Also indicates if they elected to make voluntary contributions.</p> <p>A voluntary contribution is an election an employee can make in Online Member Services (OMS) to make up the amount being redirected from their Individual Account Program (IAP) account to their Employee Pension Stability Account (EPSA) because of the Member Redirect program.</p>
IAP Voluntary Contribution	Employees who have opted to make contributions to their Individual Account Program (IAP) account to make up for the amount redirected to their Employee Pension Stability Account (EPSA).

PERS spring cleaning

Inactive Employment Report

Run an Inactive Employment Report twice a year.

- Keep member annual statements more accurate.
 - Accounts of members who have not been terminated could receive overstated service credit.
- Help your retirees begin receiving their retirement benefits sooner.

Learn more

[Employer reporting guide 24, Running Reports.](#)

[Employer reporting guide 15, Reporting a Termination or Death](#)

The screenshot displays the PERS Employer Home interface for 'BIG SCHOOL #1' (Employer Number: BS). The left sidebar contains a 'SITE NAVIGATION' menu with the following items: Employer Home, View Your Statement, Work on Reports, View Employee Info, View Year-to-Date Wage and Contribution Summary, Update My Profile, Work with Contacts, Admin Web Accounts, Work List, Request Information, Eligibility Reports, Status Check, Inactive Employment Report (highlighted with a red box), and View IAP Voluntary Contribution Report. The main content area is titled 'INACTIVE EMPLOYMENT REPORT' and includes a 'Tell Me More' link. Below the title, it states: 'This report lists all employees who have open employment segments and appear to be inactive.' There is a 'Download CSV File' button. A 'TELL ME MORE' section follows, explaining that the report is for informational purposes only and lists employees that may need terminations reported to PERS through EDX. It also notes that the 'Download CSV File' button will pull information into a CSV file, including PERS ID, SSN, last name, first name, middle initial, last pay date, hire date, and contribution start date.

PERS spring cleaning

Lists and forms

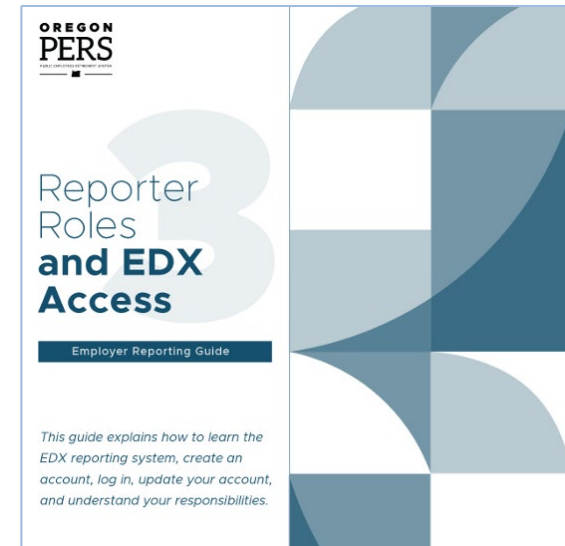
1. Manage your EDX users and PERS Contacts List.
2. Verify and update forms, if necessary:
 - [Web Administrator Agreement form.](#)
 - [ACH Agreement form.](#)
3. Complete Work List requests.

Learn more

[Employer reporting guide 3, Reporter Roles and EDX Access.](#)

[Employer reporting guide 19, Completing Work List Requests.](#)

[Paying for PERS webpage.](#)

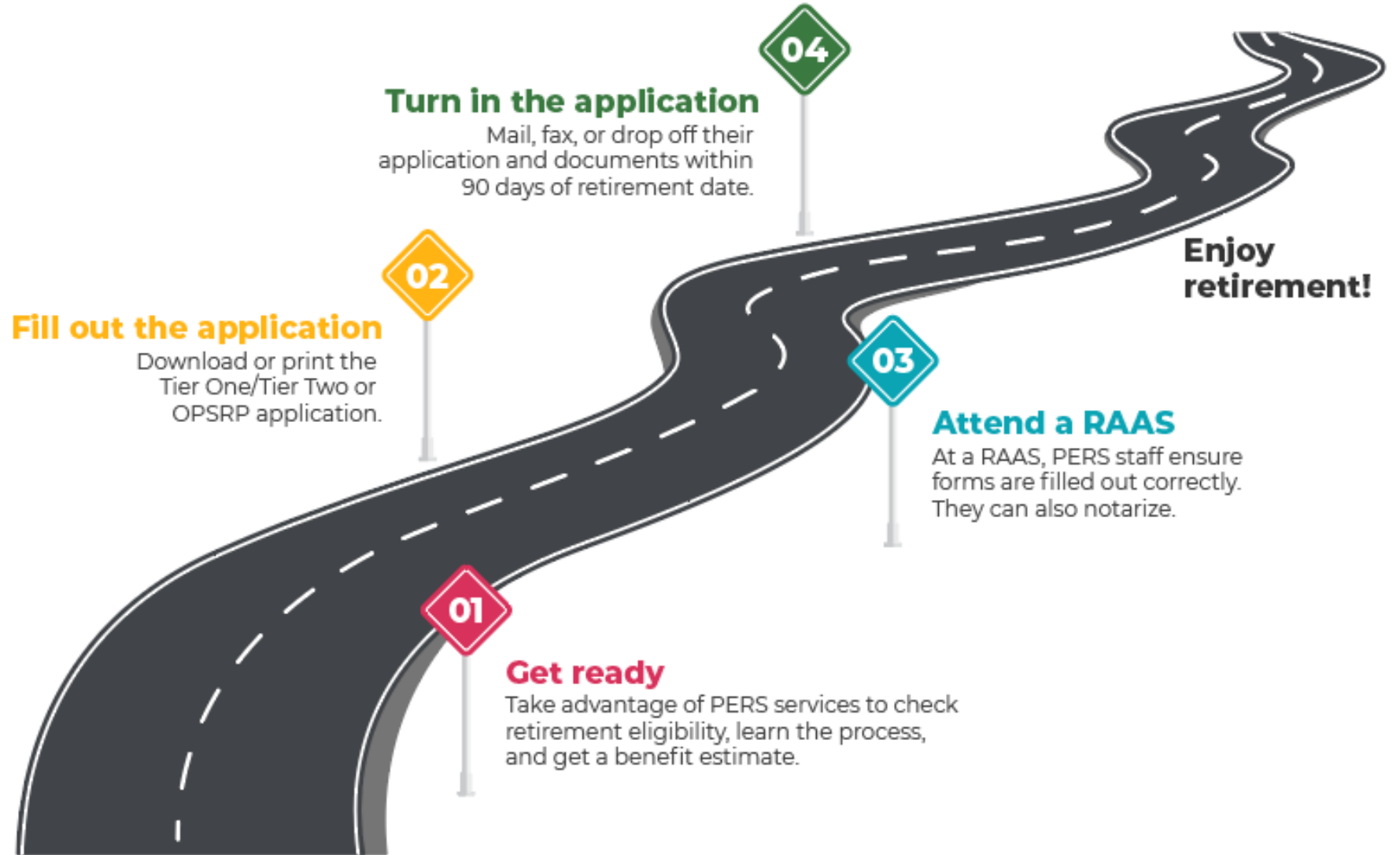


PERS retirees

- Employee steps
- Employee support
- Employer reporter steps
- Hiring a PERS retiree
- Making corrections after retirement

PERS retirees

Employee steps



benefit factor % × years of service × final average salary

PERS retirees

Employee support

How do I fill out this retirement application?

What's the status of my application?

Can I return to work for my employer after retirement?

I have two employers; can I retire from one and not the other?

How is my reported unused sick leave used in my benefit calculation?

If your employee or retiree comes to you with retirement questions like these, let PERS Member Services help.

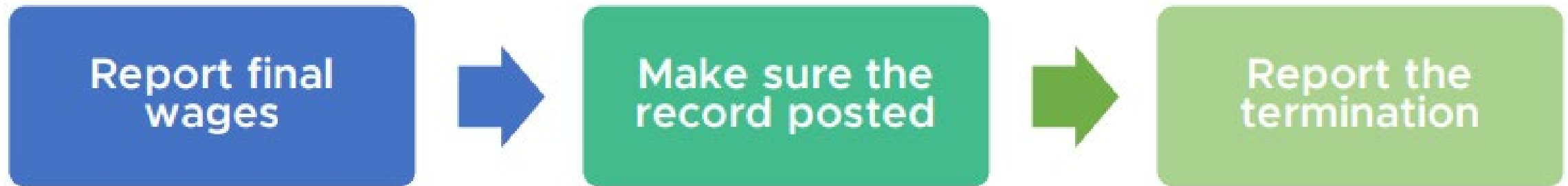
Your employee can call Member Services at 888-320-7377.

PERS retirees

Employer reporter steps

When an employee is ready to retire, you need to report their final wages on a Detail 2 record and their termination status on a Detail 1 record to PERS right away.

Tip: To ensure final wages are included in the member's retirement calculation, submit the final wage record prior to submitting the Detail 1 status code 02 termination record.



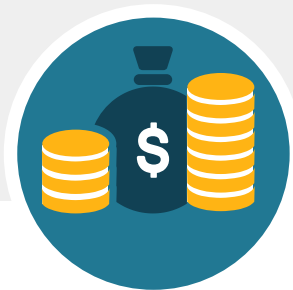
PERS retirees

Hiring a PERS retiree

STEP 1

Report their final wages

1. Create a Detail 2 Wage and Contributions record that contains the employee's final wages and IAP contribution.
2. Release it with your Regular report.
3. On the next business day, make sure the record posted.



STEP 2

Report their termination

1. Create a Detail 1 Member Demographics record with a Termination status code, as explained in employer reporting guide 15, [Reporting a Termination or Death](#).
2. Release it with your Demographics and Adjustment report.
3. On the next business day, make sure the record posted.



STEP 3

Report their hiring

1. Create a Detail 1 record with 11 - Retiree New Hire with Hr Limit status code (unless retiree qualifies for an exception*). Learn more in employer reporting guide 8, [Hiring a PERS Retiree](#).
2. Release it with your Demographics and Adjustment report.
3. It will post after their retirement processes.**



**Use status code 12 if retiree qualifies for a [pre-SB 1049 exception](#). Use status code 13 only if retiree is canceling retirement and returning to active membership.*

***Retirement processing can take up to 90 days. Once it processes, resave the record.*

PERS retirees

Making corrections after retirement

- Starting in 2024, employers can no longer request changes to a PERS account past 240 days after retiree receives Notice of Entitlement.
- If employer reporter tries to post hours and wages to a retired account in EDX, they will get the error message “S-Cannot report wage or employment information” because the member is retired or their account is closed.
- PERS’ staff will not be able to reopen the account to correct the hour and/or wage information.



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Learn more: [Employer announcement 104](#)

Employer support

- Employer Service Center
- New and updated resources

Employer support

Employer Service Center

- **Quick questions and status checks** — call the Employer Call Center line 888-320-7377 between 8:30 a.m. to 12:00 p.m.
- **In-depth questions and assistance** — call or email your ESC account representative. Expected response time from your account representative is one business day.
- Is there a topic you'd like to see covered in an upcoming **employer webinar**? Please reach out to me (Theresa Tabish) at 503-431-8947 or by email theresa.tabish@pers.oregon.gov
- **Any other issues** — please reach out to the ESC manager Laurel Galego at 503-603-7628 or by email laurel.galego@pers.oregon.gov.



Employer support

New and updated resources



[Guide 9, Reporting Wages for a Qualifying Employee](#)

Reporting qualifying wages and what to do if employee doesn't qualify.

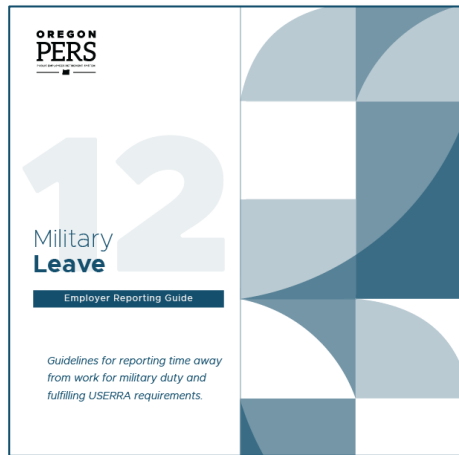


[Guide 10, Reporting Wages for a Non-Qualifying Employee](#)

Reporting non-qualifying wages and what to do if employee becomes qualifying.

Employer support

New and updated resources



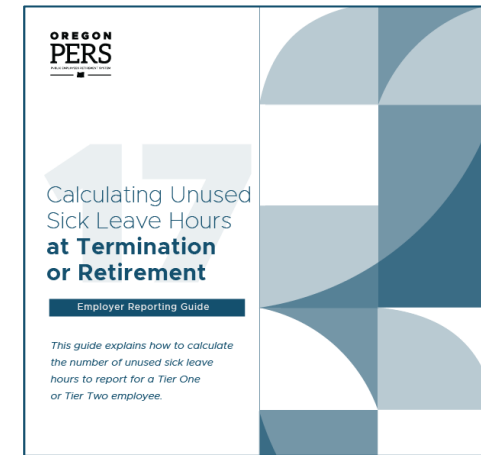
[Guide 12, Military Leave](#)

How to report a USERRA-qualifying military leave and ensure employee earns retirement benefits.



[Guide 16, Reporting a Retirement](#)

How to help employees understand their PERS benefits package; how to retire.



[Guide 17, Calculating Unused Sick Leave Hours at Termination or Retirement](#)

How to calculate a Tier One/Tier Two employee's unused sick leave hours for their termination record.

Questions & answers

Q&A

Questions?



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THANK YOU

