



## May 2014 PERS Employer Monthly Update

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- 1) **May reconciliation processing 'tip'.**

The ESC team would invite all employers to review their contact information (names, phone numbers, email addresses) in EDX to assure that information is both up-to-date and complete. Questions on this subject should be directed to your ESC Account Team. You can find your ESC Account Team members by clicking the "Find Your ESC Account Team" link on the PERS employer webpage, [www.oregon.gov/pers/emp/pages/index.aspx](http://www.oregon.gov/pers/emp/pages/index.aspx).

- 2) **Reminder: Use of Work Period Begin/End dates.**

**Local government employers need to report wages with Work Period Begin and End Dates for their Ch.238 Tier 2 and OPSRP employees.** The DTL2 Work Period Begin Date and Work Period End Date fields are used by local government employers to **specify the period worked for a reported pay date.** **Although not required, local government employers may also report Tier 1 employees with work period dates, to make reporting uniform and less time-consuming.**

An employer can determine status as a local government employer in two ways: 1) A PERS employer number in the 2000-2879 range, and 2) Review Oregon Revised Statutes (ORS) 174.116, which is a list of organizations defined as local government employers. Statute reference is the recommended method of verifying local government status.

**Any employer can change a member's job class through a DTL2 record,** but the change may not be retroactive and may require submission of two DTL2 records for a member for the pay period in which the member's job class changes. Work Period Begin Date and Work Period End Date fields would be used on each of the two records to correctly identify when in the pay period the job class change was effective.

Please remember:

1) **ONLY local government employers should use Work Period Begin/End Dates when reporting wages, hours and contributions.**

2) **Non-local government employers should normally NEVER use Work Period Begin/End Dates when reporting wages, hours and contributions.**

3) ANY employer can change job class using a DTL2 record.

A) **If the job class change is effective during a pay period, two DTL2 records would be reported** for an individual whose job class changes in a given pay period.

**The first DTL2 record** would include wage, hour and contribution information for the current job class and **use the pay period begin date as the Work Period Begin Date and the day before the effective job class change as the Work Period End Date. Do not enter Job Class or Average Overtime Hours information on this DTL2 record.**

**The second DTL2 record** would include wage, hour and contribution information for the new job class and **use the job class change effective date as the Work Period Begin Date and the pay period end date as the Work Period End Date. Enter the new Job Class and fill in the Average Overtime Hours information on this DTL2 record.**

B) **If the job class change is effective at the start of a pay period, one DTL2 record would be reported** for the pay period, with Job Class and Average Overtime Hours information entered on that record. The Work Period Begin Date would be the first day of the pay period, and the Work Period End Date would be the last day of the pay period.

C) **Job class changes made with DTL2 records may be prospective only.** If a job class change is required for a past time period and salary has already posted for this time period, complete a Demographic Correction Request (DCR) to notify PERS of the job class corrections needed.

D) DCRs may be used for any job class change if preferred.

4) **After a Job Class change via DTL2 record is complete:**

A) **Non-local government employers would NEVER** enter Work Period Begin Date, Work Period End Date, Job Class or Average Overtime Hours information on future DTL2 records for the individual, unless job class or average overtime code changes again.

B) **Local government employers would continue** use of Work Period Begin Date and Work Period End Date fields on DTL2 records reporting wages, hours and

contributions for their employees, but would NEVER enter Job Class or Average Overtime Hours information on those DTL2 records.

**C) NO employer would enter job class information, including Job Class and Average Overtime Hours code, on ANY DTL2 record UNLESS the job class is actually being changed with that DTL2 record.**

Contact your ESC Account Team representative if you have further questions on this subject.

### **3) Upcoming employer online statement and invoice updates.**

The PERS online employer statement and invoice will be expanded to reflect three separate invoice areas effective June 2014. Those areas are:

- 1) IAP, which include member IAP account contributions.
- 2) Pension, which includes Tier1/Tier2 and OPSRP normal cost, Unfunded Actuarial Liability (UAL) costs and employer side account credits.
- 3) RHIA and RHIPA, health insurance subsidies available to qualified PERS retirees.

Employers making PERS payments by the ACH Debit method (PERS “pulls” money from an account to which the employer has granted PERS access) need to do nothing to prepare for this change. However, employers making PERS payments by the ACH Credit method (the employer “pushes” money into a PERS account to which the employer has been given access) must update their organization bank credit information.

ACH bank credit information update requirements have been sent to ACH Credit employers, and will be sent again prior to the June 2014 statement/invoice updates. Employers may begin updating their bank credit information right now, and bank credit information updates complete prior to the introduction of the updated online employer statements and invoices **will not affect** posting of ACH Credit employer payments.

### **4) EDX employer training is now available online.**

The same EDX employer training documentation used in the concurrent Tigard and Internet EDX employer training sessions is now available online. Employers may access the training material at any time by clicking this link:

[http://www.oregon.gov/pers/EMP/pages/section/er\\_training/edx\\_101.aspx](http://www.oregon.gov/pers/EMP/pages/section/er_training/edx_101.aspx)

or by starting at the PERS employer web page, [www.oregon.gov/pers/emp/pages/index.aspx](http://www.oregon.gov/pers/emp/pages/index.aspx)

then clicking the “EDX Self-Paced Education” link under the “Employer Training and Education” heading. Available documentation includes same EDX Basic Concepts, EDX Reporting Topics-Eligibility and EDX Reporting Topics-Reporting Retirees presentations and quizzes used in concurrent classroom/internet training sessions.

### **5) Spring 2014 Employer Outreach registration available.**

Seating is still available at for the Spring 2014 Employer Outreach presentation at sites throughout the state of Oregon. A list of remaining sites, dates and times can be found through this link:

[http://www.oregon.gov/pers/EMP/pages/section/er\\_presentations/index.aspx](http://www.oregon.gov/pers/EMP/pages/section/er_presentations/index.aspx)

or by starting at the PERS employer web page then clicking the “Outreach Presentation Schedule and Registration” link under the “Employer Training and Education” heading. Registration for outreach presentations is entirely online; your ESC Account Team representative cannot assist you with outreach registration.

**6) PERS Disability program reminder.**

**Please refer your employees to the PERS website or PERS Customer Service with questions regarding disability.** Representatives are available at PERS Customer service, Monday - Friday, 8:30 am - 5:00 pm, at 503-598-7377 (Portland metro calling area) or toll-free at 888-320-7377.

Best regards,