



March 2016 PERS Employer Monthly Update.

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- 1) Time remains to post records for the 2015 reconciliation year.**

2015 Year-End Processing closed Monday, February 29, 2016 but employers have until the March 5th statement to resolve errors and post records for the 2015 reconciliation year. **Please Note: March 5th falls on Saturday this year so the first March statement, normally generated March 5th, will be generated during batch processing Friday evening, March 4, 2016.**

Employers should make every effort to have final 2015 records and reports posted prior to the March 5, 2016 statement, and should pay their March 5th statement in full and on time. Earnings on calendar year 2015 contributions invoiced on the March 5th statement and paid in full by the due date will be provided by PERS investment earnings for 2015. Earnings on calendar year 2015 contributions invoiced after the March 5, 2016 statement, or paid after the due date for the March 5th statement, will be considered “prior year” earnings and will be provided by employers.

2015 member annual statements will be sent late spring 2016, to the member’s home address recorded in EDX as of March 5, 2016. Please make every effort to submit DTL1 records correcting home addresses no later than March 5, 2016.

Please consult your ESC Account Team for remaining calendar year 2015 record and report questions or problems.

- 2) Prior Year Earnings (PYE) invoicing for March and April 2016.**

Prior year earnings result from contributions invoiced for qualifying service in prior years. Prior year earnings may be generated by employer correction of records for a prior year or by a change

to “qualifying” status for employee service in a prior year, prompted by PERS staff review or by request from the employer.

The PYE process begins with calculation and entry of a PYE invoice in the “Un-billed Activity” area of the employer online statement on the 6th of any month. The employer has from the 6th of the month until the 20th of the month to dispute the PYE invoice. If the dispute is unsuccessful, or if the employer chooses not to challenge the invoice, the PYE invoice then appears on the employer’s 20th of the month statement.

The PERS Board meets in March each year to adopt earnings rates for employer and member accounts for the past calendar year, in this case calendar year 2015. This affects the March and April PYE processes by delaying PYE invoice posting to Un-billed Activity until late March and delaying entry of any March 16-31 and April PYE invoices into employer statement Un-Billed Activity until May 6th, 2016. There will be no PYE invoicing for April 2016.

Please contact your ESC Account Team representative for any questions on this annual PYE process deviation.

3) Reminder: Immediately return to PERS any completed Designation of Beneficiary forms received from employees.

Employers are reminded to **immediately return to PERS any completed Designation of Beneficiary forms received from employees.**

Although employees may give an employer completed Designation of Beneficiary forms to submit to PERS, it still remains **the member’s responsibility** to make sure a change of beneficiary designation is received by PERS. **A change of beneficiary designation is not considered effective until the form is accepted by PERS.**

Tier One/Tier Two members should complete both an IAP Pre-Retirement Designation of Beneficiary Packet **and** a Tier One/Tier Two Pre-Retirement Designation of Beneficiary form OPSRP members should complete an IAP Pre-Retirement Designation of Beneficiary Packet.

The Tier One/Tier Two PERS member account of a Tier One/Tier Two member who has no PERS Pre-Retirement Designation of Beneficiary recorded with PERS will be distributed as required by statute. The IAP account for both OPSRP and Tier One/Tier Two member who have no IAP Pre-Retirement Designation of Beneficiary recorded with PERS will be distributed as required by statute.

There is no pre-retirement designation form for an OPSRP Pension benefit. **An OPSRP Pension pre-retirement benefit would be paid: 1) Only if the OPSRP member is vested in their Pension account prior to retirement, and 2) Only to a spouse or person constitutionally required to be treated as a spouse.**

4) Suggested topics for Spring 2016 Employer Outreach presentations?

Site scheduling and formulation of the Spring 2016 Employer Outreach presentation is about to begin. If you have any suggested topics for coverage in the Spring 2016 Employer Outreach presentation **please e-mail those topics to this address no later than 12:00 noon, Tuesday, March 8, 2016: pers-employer.info.services@pers.state.or.us**

5) 2016 Employer EDX training dates are now available through June 2016.

Beginning January 2016 EDX Employer Training is divided into three phases:

1) EDX Basic Concepts: This segment is appropriate for those who've just begun their PERS reporting duties or returned after a long absence. The segment reviews the roles of Payroll Specialist and Web Administrator, reviews report types and the process to generate reports. The DTL1 Member Demographics and DTL2 Wage and Service records are covered in depth. The course includes hands-on practice creating records and reports.

2) EDX Advanced Topics: This segment is appropriate for those who've attended the Basic Concepts course or have experience in their PERS reporting duties. A variety of topics are covered, including reporting Leave w/o Pay (LWOP), reporting USERRA, changes to contribution reporting effective January 1, 2016, the P&F Units program, and others. A review of eligibility rules and reporting retirees follows the Advanced Topics presentation.

3) Employer Actions as Members Near Retirement: This short segment reviews PERS requests employers may receive as a member nears retirement. Suggested actions at the start of a PERS career, and member record changes which may be required during a career are also covered.

Registration for any training segment is done exclusively online. Available dates and times for any training segment, offered simultaneously through the Internet or at PERS Tigard headquarters for any training date, can be found by starting at the PERS employer web page, www.oregon.gov/pers/emp/pages/index.aspx then clicking links in this order: "Employer Training and Education Opportunities" > "Employer Class Schedule and Information".

6) Employer Announcement 96: Senate Bill 454 "Sick Time" and the PERS Unused Sick Leave Program updated with FAQs (Frequently Asked Questions).

Employer Announcement #96: Senate Bill 454 "Sick Time" and the PERS Unused Sick Leave Program has been updated and reposted with FAQs (Frequently Asked Questions) underscoring the differences between the PERS Unused Sick Leave Program described in ORS 238.350 and "sick time" defined in SB 454, passed in the 2015 Legislative session. The FAQs describe what should be reported to PERS when employees terminate employment. Calculation and reporting of unused sick leave, differentiated from "sick time", is outlined in Employer Announcement #88, found through the "Employer Announcements" link on the PERS employer web page, www.oregon.gov/pers/emp/pages/index.aspx

7) Employer Announcement 98: Leave Without Pay and Disability/Workers Compensation.

Employer Announcement 98: Leave Without Pay and Disability/Workers Compensation describes employer reporting of a member's unpaid leave of absence due to injury covered by Workers Compensation benefits. The announcement outlines reporting of any employer payments made to equalize the difference between Workers Compensation benefits and member salary and the process by which a Tier One/Tier Two member may request service credit for an unpaid period of injury leave covered by Workers Compensation benefits. This service credit request is not available to OPSRP members. The Workers Compensation Certification form will be posted and available in the near future.

Best regards,