

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Employer Advisory Group

April 21, 2023



Agenda

- Director's Office update
- Legislative update
- Modernization update
- Actuarial update
- Employer Service Center update
- Communications update
- Additional items
- Open discussion

Director's Office update

Yvette Elledge-Rhodes, PERS' Deputy Director

Director's Office update

- April 3 PERS Board meeting.
- New prospective board member.
 - Suzanne Linneen, City of Hillsboro Finance Director.
- PERS 2023-25 budget update.



Legislative update

Heather Case, PERS' Senior Policy Advisor

Legislative update

PERS agency bills

Status

- As of April 3, about 2,800 bills introduced this legislative session.
- Work session schedule deadline: March 17.
 - Work sessions for bills held between March 17 and April 4.

PERS agency bills

House Bill (HB) 2283 — PERS modernization fixes.

HB 2284 — Divorce fee increase.

HB 2285 — Social Security update statutes.

Continued

Legislative update

Other PERS bills of note

HB 2054 — District attorneys Police and Fire (P&F) job classification.

HB 2296 — WAR sunset extension for 10 years.

HB 2297 — Employers to purchase up to three years of military service credit for employees.

HB 2875 — Raising limit on average overtime for Oregon State Police.

HB 3387 — Allows P&F members to retire at lower P&F retirement age if they have served 25 years in P&F position, regardless of position at time of retirement.

Senate Bill (SB) 987 — Lower contribution rates for charter schools.

Modernization update

Rebecca Craven, PERS' Modernization Program
Director

Modernization update

First modernization efforts

Update

- Modernization program activity picking up in 2023-25.
- Early activities beginning in next few months.
- First modernization efforts include **telephony**.

Employer involvement

- At next EAG meeting, provide more information about how EAG and employers can give input.
- Ask employers to help legitimize PERS Modernization Program's asks for information and participation of members.

Please reach out any time if you or your members have questions about modernization. Email rebecca.craven@pers.oregon.gov.

Actuarial update

Jake Winship, PERS' Associate Actuary

Actuarial update

Employer Rate Projection Tool (ERPT)

ERPT updated (January 26, 2023)

- Data updated to reflect 2021 rate-setting valuation.
- Some labels displayed in the user interface (UI) were misleading.
 - Outcome of communication challenges during ERPT development.
 - Dates displayed were erroneous or confusing.

Deployed additional update (March 16, 2023)

- Removed most date references.
- Should simplify future updates.
- Established procedures for functional enhancements.

Actuarial update

Edits to 2022 Valuation Report

Based on recommendations from Employer Advisory Group (EAG) and Gabriel, Roeder, Smith & Company (GRS) audit.

Employer contribution rates display

- Will compare new contribution rates to current contribution rates.
- Will show Multnomah Fire District #10 and rate collar impact to unfunded actuarial liability.

Side account information

- Rate offset beginning date for every account.
- Rate offset ending date for every account.

Actuarial update

Reformatting presentation

Presentation status

- Reformatting presentation delayed.
- Ongoing discussions with Milliman.
- Staffing shortage in Actuarial Section will soon be resolved:
 - Finalizing interview process for Actuarial Business Analyst.
 - Introduce new team member at July 2023 EAG meeting.

Employer Service Center update

Laurel Galego, Employer Service Center Manager

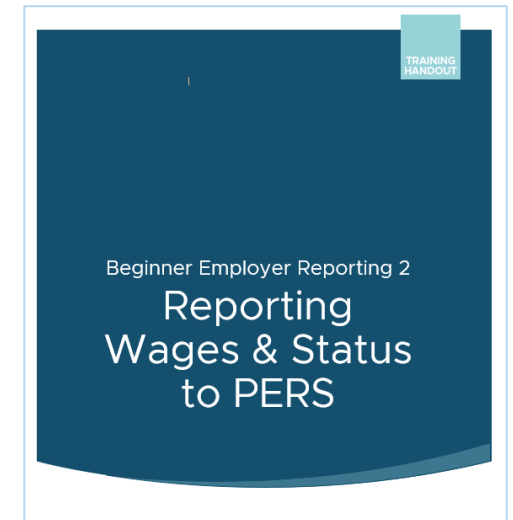
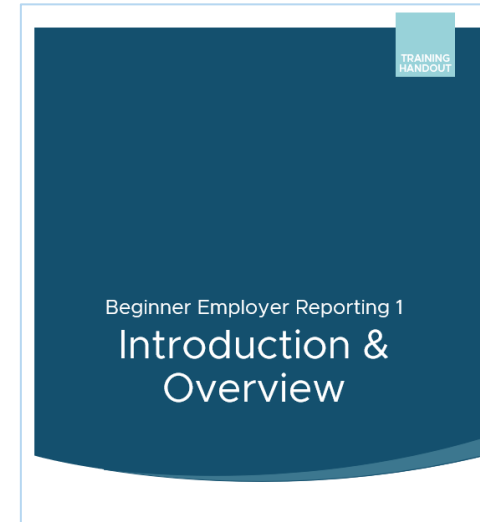
Employer Service Center (ESC) update Training

ESC instructor-led training

- Coming soon!
- On hold because of staffing changes.
- Meanwhile, courses being updated:
 - More detailed content.
 - Additional topics in new courses.
 - Five courses instead of previous two.

Training handouts

- Available on [Training webpage](#).
 - Provide instructions and exercises.
 - Useful for independent learning.

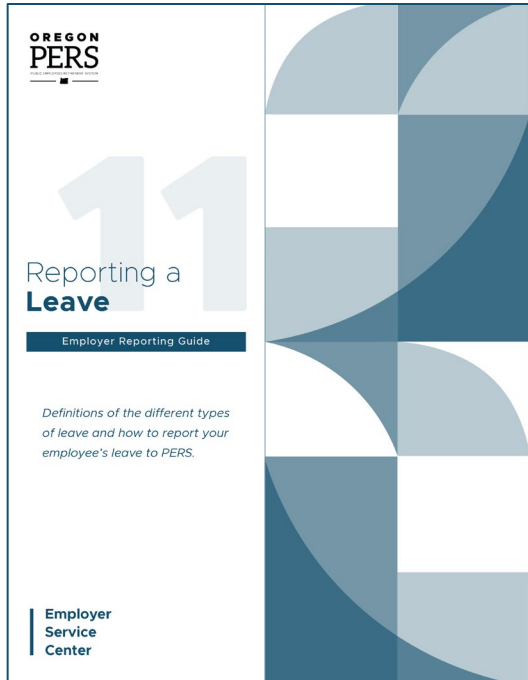


Communications update

Shawn Harper, PERS' Employer Communications Specialist

Communications update

New employer reporting guides



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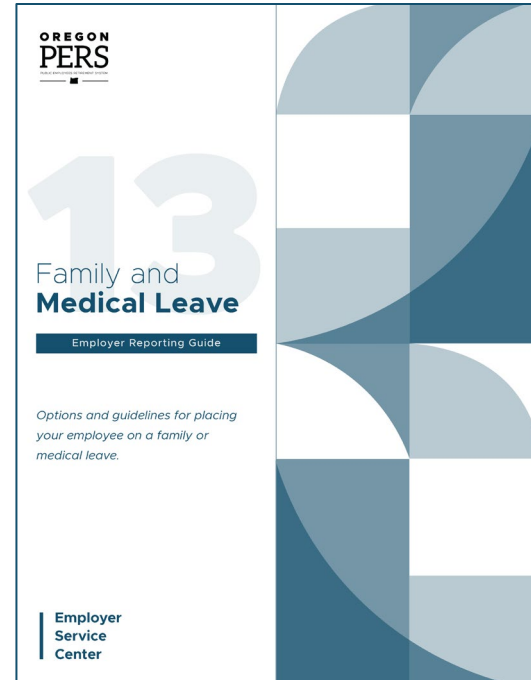
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Reporting a Leave

Employer Reporting Guide

Definitions of the different types of leave and how to report your employee's leave to PERS.

Employer Service Center



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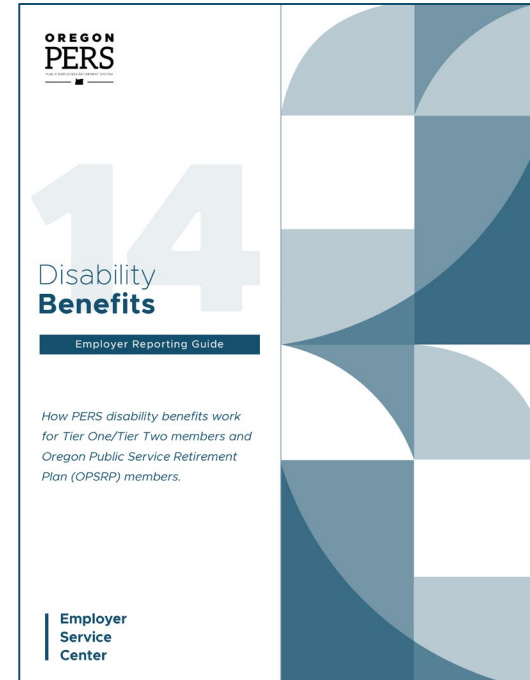
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Family and Medical Leave

Employer Reporting Guide

Options and guidelines for placing your employee on a family or medical leave.

Employer Service Center



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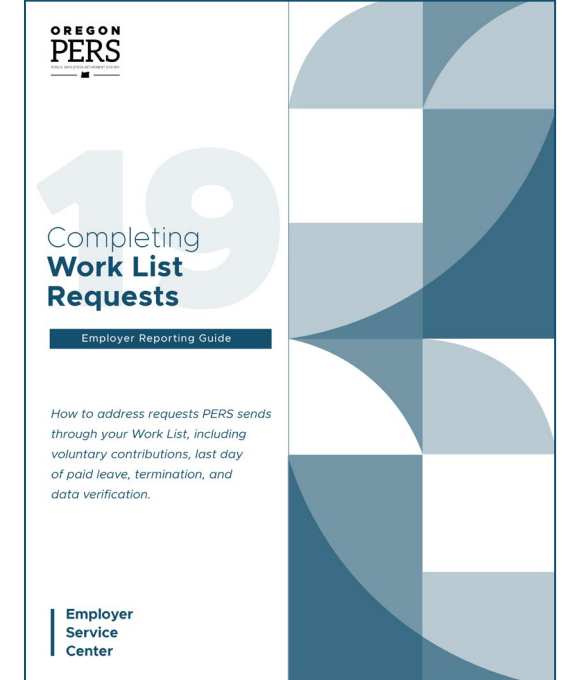
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Disability Benefits

Employer Reporting Guide

How PERS disability benefits work for Tier One/Tier Two members and Oregon Public Service Retirement Plan (OPSRP) members.

Employer Service Center



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Completing Work List Requests

Employer Reporting Guide

How to address requests PERS sends through your Work List, including voluntary contributions, last day of paid leave, termination, and data verification.

Employer Service Center

Communications update

New guides coming soon

12
Military
Leave

Employer Reporting Guide

Guidelines for reporting time away from work for military duty and fulfilling USERRA requirements.

20
Creating a
Demographic
Correction
Request (DCR)

Employer Reporting Guide

This guide explains when a DCR is needed, how to create one, and how to respond to one from PERS.

25
Sending an
Encrypted
Message
to PERS

Employer Reporting Guide

This guide explains how to use the Request Information function to communicate with the Employer Service Center (ESC).

26
Understanding
Your
Statement

Employer Reporting Guide

This guide explains the invoice charges and credits in each section of your monthly statement.

27
Paying
Your
Invoice

Employer Reporting Guide

This guide explains how to pay your invoice through Automated Clearing House (ACH).

Communications update

Member and employer surveys

Agency annual member and employer satisfaction surveys

- May 1–31.
- Link sent by email and posted on website.
- Measure:
 - Quality of service.
 - Timeliness of service.
 - Knowledge and expertise of PERS' employees.
 - Availability of information.
 - Helpfulness of services and information.
 - Usefulness of tools.



Communications update

Striving to reach more members

Communications is taking steps to increase number of members on email lists.

- Member must subscribe to receive emails from GovDelivery.
- GovDelivery emails are top method for reaching PERS members, but only about 30,000 out of nearly 400,000 members* are subscribed and have chosen topics.
- More than 175,000 members have subscribed without choosing topics — meaning they aren't receiving emails.

*According to the 2022 *PERS by the Numbers*, PERS serves more than 393,000 current and former public employees and beneficiaries.

Communications update

Striving to reach more members

Actions

- Emailed the 175,000 subscribers with instructions to choose their topics.
- Email again in six months.
- Providing posters employers can hang in office or email to remote employees. QR code opens email subscriber page.

Results

- As of April 1, 12,000+ members have added 45,000+ subscriptions.



Additional items

- Employer penalties, Brandon Armatas
- Member annual statements, Brandon Armatas
- Employer support announcement, Laurel Galego

Additional items

Employer penalties

Quick recap

- Oregon Administrative Rule (OAR) updates triggered a review.
- Penalties are set in statute for:
 - Late reporting.
 - Late payment.
 - Incorrect payment method.
- Penalties have been waived for all employers over last decade.



Additional items

Employer penalties

Moving forward

- PERS reviewing how to strategically manage penalties.
- Have done some initial analysis on what/how the programming works.
- Looking into process mapping to help determine what programming may be needed.
- Before anything goes live, will circle back to EAG to share and discuss.

Additional items

Member annual statements

Current status

- Minor cosmetic updates being made this year; otherwise no additional data changes.
- Prepping for data extract and testing to ensure statements are accurate.
- Working with Publishing and Distribution and gliding toward a mid-May mailing date.

Impact to employers

- Efforts to update member addresses should continue to reduce number of returned statements.
 - Several different notifications to members to update incorrect addresses.
 - Using the National Change of Address Database again.

Additional items

Member annual statements

Fielding MAS questions

- The statements will again have a back page that provides high-level information.
- MAS FAQ on PERS website will be updated:
 - <https://www.oregon.gov/pers/MEM/Pages/Member-Annual-Statement-FAQs.aspx>
 - Interactive example statements provide detailed information.
- PERS Member Services able to provide additional assistance.

Additional items

ESC support

How to reach ESC



By email

ESC representatives are available to answer emailed questions Monday to Friday from 8 a.m. to 5 p.m. Email your assigned representative directly or the [Employer Support inbox](#). Most emails are answered within 24 hours.



By phone

ESC representatives are available to assist by phone Monday to Friday. Call your assigned representative's direct phone line between 8:00 a.m. to 4:00 p.m. or the Employer Call Center line between 8:30 a.m. to 12:00 p.m. at 888-320-7377.

Open discussion

Open discussion

Any questions or comments for PERS?

Questions for each other?



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Thank you!

