June 2015 PERS Employer Monthly Update.

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1) Reconciliation 'tip' for June.

This is a good time for employers to begin review payroll records to determine whether any of their part-time employees would now be expected to work 600 or more hours during 2015. Employers should submit a Demographic Correction Request (DCR) to change position qualification status (also known as Position Type) from "non-qualifying" to "active service" for part-time positions expected to qualify in 2015.

Employee concurrent employment questions can be answered by review of the Year-to-date Wage and Contribution Summary screen available through the "View Year-to-date Wage and Contribution Summary" link, and by review of eligibility reports available through the "Eligibility Reports" link (both found in the Site Nav. area on any EDX screen), or through your ESC Account Team members.

2) 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 stamped as received by PERS.** Tier One/Tier Two members should complete both an IAP and Pre-Retirement Designation of Beneficiary form. 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 to the member's estate. OPSRP members should complete an IAP designation of beneficiary form.

3) Reminder: The first report of Unit contributions for Tier One/Tier Two Police & Fire (Job Class 02) by local government employers.

Local government employers with pay periods crossing monthly boundaries must use two DTL2 records to report all employees for any pay period crossing monthly boundaries. Employers can split reported wages, hours and contributions between the two DTL2 records any way they wish, as long as the two DTL2 records include all wages, hours and contributions reported for each employee in that pay period crossing monthly boundaries. **However...**

If you've just hired a Tier One/Tier Two P&F Unit program participant or you have a current Tier One/Tier Two P&F employee who has just elected to participate in the Units program, and you are making your first report of Unit contributions for the employee, **then please include the entire unit contribution IN ONLY ONE of the two DTL2 records** required for reporting wages, hours and contributions for a pay period crossing monthly boundaries. You may split pay period wages, hours and contributions between the two required DTL2 records**, but PLEASE DO NOT split the unit contributions between the two DTL2 records; put the entire Unit contribution amount in either one of the two DTL2 records**. Including the entire Unit contribution in one of the two required DTL2 records will avoid an EDX error which would prevent posting Unit contributions for each subsequent DTL2 record with a Unit contribution entry.

4) Employer EDX Training dates for the remainder of 2015.

Dates and times for Employer EDX Training for the remainder of 2015 are now available through this link:

https://www.oregon.gov/pers/EMP/Pages/section/er_training/schedule.aspx

or 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" (found under the Employer Resources heading) > "EDX Class Schedule and Registration".

Employer EDX Training is done the 2nd Friday of each month, presented concurrently at the PERS headquarters computer lab and through the internet via iLinc, the PERS distance presentation platform. Registration for Employer EDX Training is done only online, through the links described above.

5) Social Security annual fee invoice.

PERS manages Social Security functions on behalf of public employers in the state of Oregon and levies a fee for those services. The fee covers administrative expenses associated with management of Social Security functions for the period 7/1/2015-6/30/2016 and will appear on employer statements over the next three to four weeks. The invoice is 50 cents per employee with a $15.00 minimum, based on 2013 data. This statement will appear in the "Description" area of the "Pension" section of your PERS employer online statement when the Social Security invoice is posted:

“State Social Security Administrative fee Billing Period 7/1/2015 to 6/30/2016 @ 50 cents per person, with a minimum of $15.00. Base Year 2013.”

Please direct Social Security administrative fee questions to: pamella.johnson@pers.state.or.us

Best regards,

In compliance with the Americans with Disabilities Act, PERS will provide this document in an alternate format upon request. To request this, contact PERS at 888-320-7377 or TTY 503-603-7766.