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Employer EDX training availability for the remainder of 2017

Employer EDX training class schedule for the remainder of 2017 is now available online. EDX training presentations are being offered online only through the internet via iLinc, the PERS distance presentation platform. Internet-based training can be done from any site with an internet-capable workstation and phone (preferably with speaker phone capability).

Registration for EDX employer Basic Concepts and Advanced Topics presentations can be found at

<http://www.oregon.gov/pers/EMP/Pages/Training-and-Presentation-Schedules.aspx>

...or by starting at the PERS Employer web page: www.oregon.gov/pers/emp/pages/index.aspx then clicking links in this order: “Training & Presentation Schedules” (found under the Resources heading) followed by “Employer Class Schedule and Information, and Registration.”

The EDX Basic Concepts class is recommended for those new to PERS reporting duties. This course will review:

- PERS reporting roles;
- Regular and Demographics and Adjustment reports and their functions; and
- DTL1 Member Demographics and DTL2 Wage and Service records, which will be reviewed in depth, field by field and followed by a hands-on lab session.

The EDX Advanced Topics class will cover a variety of reporting topics, including:

- reporting leave without pay (LWOP),
- determination and reporting of USERRA-qualified military service,
- completion of Salary Breakdown (SBD) forms,
- changing member account contribution methods,
- determination of “employee” status, and
- Police and Fire Unit program participation.

The presentation also includes a review of PERS membership eligibility rules and a review of reporting retirees returning to work part-time as retirees.

For specific training needs or suggestions, please feel free to submit comments to: pers-employer.info.services@pers.state.or.us

Retiree DTL1 status code and DTL2 wage code suspending?

If the records suspend upon submission, employers should wait 90 days from the date of submission or until confirming the retiree has received his/her first benefit check before re-saving those suspended records.

Both DTL1-11 and DTL2-07 records will suspend until the individual’s status changes from active service to retiree.

A DTL1-15 record is not used to rehire an OPSRP member as a retiree unless instructed to do so by your ESC Account Representative.

Status checks

Do you have a new or returning employee? A status check will help decide how to report a new employee within PERS reporting.

The status check screen shows an individual's current PERS account status. That status could change at any time based on information reported and received by PERS.

The status check screen appears when you click on the "status check" link in the site navigation area of your employer home page.



Information on this screen is available before you post any records in EDX and can help you determine when to begin contributions on this person.

You may also request a status check by calling the Employer Service Center 8:30 a.m.-noon M-F at 888-320-7377 or contacting your employer account representative <http://www.oregon.gov/pers/EMP/Pages/ESC-Representatives.aspx>

Reminder: Reporting contributions for those who establish OPSRP membership on or after January 1, 2016

Contributions for employees establishing OPSRP membership on or after January 1, 2016, begin with the **first full pay period following the six month wait time**. Employers will need to use a different procedure to correctly report wages and contributions for any pay date after OPSRP membership is established if the pay period for that pay date includes both waiting time service and active service.

Please see Employer Announcement #97: Member and Employer Account Contribution Requirements effective January 1, 2016 for the full procedure and examples on how to report wages.

<http://www.oregon.gov/pers/EMP/Documents/Employer-Publications/Employer-Announcements/2015/Employer-Announcement-97.pdf>

Contact your ESC Account Team representative if you have questions on this topic

<http://www.oregon.gov/pers/EMP/Pages/ESC-Representatives.aspx>

PERS retirees returning to work

Tier One/Tier Two retirees

After retirement, Tier One/Tier Two retirees may return to work for a PERS participating employer(s) and continue to receive their retirement benefits as long as they do not work 1,040 hours or more in a calendar year. A Tier One/Tier Two retiree may work up to 1,039.99 hours per calendar year and still be considered a retiree, but a Tier One/Tier Two retiree will re-establish active membership if the hours equal or exceed the 1,040 hour limit in any calendar year. The 1,040 hour limitation for retirees returning to PERS employment is commonly referred to as the “1,040 hour rule.” **(Please note: The 1,040-hour rule does not apply to OPSRP retirees.)**

In addition, Tier One/Tier Two retirees hired into certain positions (listed in ORS 238.082(4)-(8); Sections 2 and 3, Chapter 499, Oregon Laws 2007; and Sections 3 and 4, Chapter 774, Oregon Laws 2007) may work unlimited hours post-retirement for a PERS participating employer and continue to receive retirement benefits. To qualify for these statutory exemptions, the retiree must satisfy all the requirements for the exemption. A common requirement to qualify for these statutory exemptions is that the Tier One/Tier Two member does not receive a reduced service retirement allowance as set forth in ORS 238.280(1), (2) and (3). **(Please note: These exemptions are not available to OPSRP retirees.)**

Age/Service time requirements for Tier One/Tier Two retirement with an unreduced service benefit (“normal” benefit recipient):

Full benefits by age and years of service

Classification	Age		PERS Service
	Tier One	Tier Two	
General Service	Any Age	Any Age	30 years
General Service	58	60	No minimum
Police and Firefighter	55	55	No minimum
Police and Firefighter	50-54	50-54	25 years

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PERS retirees returning to work (continued)

Age/Service time requirements for Tier One/Tier Two retirement with a reduced service benefit (“early” retiree):

Reduced benefits by age and years of service

Classification	Age		PERS service
	Tier One	Tier Two	
General service	55-57	55-59	Less than 30 years

*An inactive police officer or firefighter (P&F) Tier One or Tier Two member who attains the age of 50 may retire with a reduced benefit as long as his or her last covered position was a qualifying P&F position.

Tier One/Tier Two “early” retirees may qualify for a limited number of exempt positions listed in ORS 238.082(4) and Section 3, Chapter 774, Oregon Laws 2007.

For more information on Tier One/Tier Two working after retirement and a list of exemptions available:

<http://www.oregon.gov/pers/RET/Documents/General-Information/Working-After-Retirement-TierOne-TierTwo.pdf>

OPSRP retirees

Hiring an OPSRP retiree into a position with “qualifying” hire intent cancels the individual’s retirement and re-establishes active membership immediately upon hire.

Hiring an OPSRP retiree into a position with “non-qualifying” hire intent allows only 599.99 hours of work (total for ALL PERS employers) per calendar year. The OAR amendment adopted at the July 31, 2015 Board meeting clarifies PERS administration for OPSRP retirees who return to work for a PERS employer after retirement, and explains how PERS re-starts the clock if an OPSRP retiree returns to work in a non-qualifying position in the same year in which he or she retires.

Please note: None of the positions listed in ORS 238.082(4)-(8); Sections 2 and 3, Chapter 499, Oregon Laws 2007; and Sections 3 and 4, Chapter 774, Oregon Laws 2007 are open to OPSRP retirees.

You can hire an OPSRP retiree into a non-qualifying position immediately after retirement and submit the DTL1-11 record at that time. In most cases that DTL1-11 record and any DTL2-07 records will suspend until EDX has been updated to reflect the OPSRP member’s transition from active to retired status. If the DTL1 and DTL2 records suspend upon submission, you do not need to resave those records for 90 days or until you have: 1) verified with the retiree that he or she has received his or her first benefit check or 2) checked with your ESC account representative that the individual is in retired status.

Also, a DTL1-15 record is not used to rehire an OPSRP member as a retiree unless instructed to do so by your ESC Account Representative.