

- Employer Rate Relief Programs from Senate Bill 1566
- July 1, 2018 contribution start date for those who establish OPSRP membership
- Employer EDX training
- Member education and retirement planning sessions

Employer Rate Relief Programs from Senate Bill 1566

The 2018 Legislature passed [Senate Bill 1566](#), which was the result of the Governor's UAL Task Force last year. The bill provides incentives for employers to make unfunded actuarial liability (UAL) lump-sum payments to PERS to reduce their contribution rates in the future. It also establishes a pooled side account for public school districts.

SB 1566 includes four UAL-reduction programs. Details about each are covered on a [new web page](#) on the PERS Employer website. The page will regularly be updated as new information is available and implementation moves forward. You can also sign up for [GovDelivery emails on this topic](#) to receive additional information in the future.

Employers also may want to use PERS' [Employer Rate Projection Tool](#) to determine the potential impact of establishing a new side account. The tool allows employers to estimate their own potential employer contribution rates and amounts for planning purposes over the next several biennia.

PERS values our employer partners' feedback, especially during rulemaking, to ensure these programs meet your needs.

Staff will not be able to answer specific questions about implementation beyond what appears on the web page; however, we welcome feedback from employers and stakeholders to help us with policy development. Please email questions and comments to Side.Account.Legislation@PERS.state.or.us.

<https://www.oregon.gov/pers/EMP/Pages/Employer-Rate-Relief-Programs.aspx>

Reminder: July 1, 2018 membership start date for new OPSRP Pension Program members

A person establishes membership in the OPSRP Pension Program by meeting the following requirements:

- be an eligible employee ([ORS 238A.005 \(4\)](#));
- complete a "waiting time" of six full calendar months, which requires that the eligible employee:
 - be employed for six months in a qualifying position with the same PERS-covered employer;
 - have no break in employment greater than 30 consecutive working days;
- be employed with the same employer on the last calendar day of the waiting time; and
- be employed with the same employer on the first calendar day of the month following completion of the waiting time.

*Special rules apply to periods of official leave without pay taken during the waiting time.

All these requirements must be met to establish OPSRP membership. If any of the requirements are not completed, the waiting time starts over on the first day of the calendar month the employee hired into a qualifying position by a different PERS-covered employer, or upon returning from a break in employment of greater than 30 consecutive working days with the same PERS-covered employer.

Eligible employees hired into a qualifying position between December 2 and December 31, 2017, or eligible employees hired into non-qualifying positions who have worked 600 hours or more with all PERS employers in 2018, establish OPSRP Pension Program membership on July 1, 2018, if all membership requirements are met.

Once OPSRP Pension Program membership is established, contributions are required for salary earned as a member on and after July 1, 2018, whatever that pay date will be.

All contributions for employees establishing OPSRP membership on or after January 1, 2016, begin with the **first full pay period following the six-month waiting 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 a full procedure and examples on how to report wages.

Remember that posting restrictions on DTL2 records allow DTL2 wage code 01 (Regular Wages) records to post only to positions with an Active Service position type, and DTL2 wage code 02 (Regular/Non-Qualifying) records post only to positions with a Non-Qualifying Service position type.

Contact your ESC account representative if you have questions about using DTL2 wage codes, waiting time requirements, or other questions on this topic:

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

Employer EDX training availability

The Employer EDX training schedule has been updated to add classes through September 2018. EDX training presentations are only offered online through iLinc, the PERS distance presentation platform. Internet-based training can be done from any site with an internet-capable workstation and phone (preferably with speakerphone capability).

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

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

or by starting at the PERS Employer home page: <https://www.oregon.gov/pers/emp/pages/index.aspx>, then clicking on links in this order: Training & Presentation Schedules (found under the Resources heading) > Employer Class Schedule, Information, and Registration. Click on one of the preferred dates under the class sessions to register.

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

For specific training needs or suggestions, please submit comments to:

Employer.Support@pers.state.or.us

Member education and retirement planning sessions

PERS offers a number of opportunities to help PERS-covered employees understand their PERS retirement benefits, including free education sessions throughout the state for members in all stages of their careers. PERS also offers help to members by reviewing retirement forms when it is time for them to retire.

Please share the following information about our education and retirement planning sessions with your staff.

PERS will be in the following cities in July and August: Albany, Ashland, Astoria, Bend, Coos Bay, Corvallis, Eugene, Grants Pass, Gresham, Hillsboro, Klamath Falls, La Grande, Madras, Medford, Ontario, Oregon City, Pendleton, Roseburg, Salem, and Tigard.

Education sessions

These sessions provide valuable retirement planning information. We hope staff will register and join one of the sessions.

- Retirement Readiness. This is for Tier One and Tier Two members within three years of retirement.
- Introduction to PERS Retirement. This is for Tier One and Tier Two members more than three years from retirement.
- All about OPSRP (Oregon Public Service Retirement Plan). This is for OPSRP members (hired after August 28, 2003) at any stage of their career.

Staff can register by going to the following link:

<https://www.oregon.gov/pers/MEM/Pages/index.aspx>. Once there, click on “Education Sessions” under either the [Tier One/Tier Two](#) or the [OPSRP](#) headings. Class size is limited, so registration is required.

Retirement Application Assistance Sessions (RAAS)

PERS also offers individual appointments for retiring members to meet with a PERS staff member to have their PERS retirement paperwork reviewed for accuracy and completeness. Members can also have their paperwork notarized during the session at no cost. These appointments are called Retirement Application Assistance Sessions (RAAS). Registration can be found through this link:

<https://www.oregon.gov/pers/MEM/Pages/RAAS/Retirement-Application-Assistance-Sessions.aspx>
