OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

EMPLOYER NEWSLETTER

March 2020

- Keep your contact information up to date: GovDelivery
- Updating contact information in EDX
- SB 1049 updates: Partial-year salary limits

Keep your contact information up to date

Please share with HR/benefits and financial contacts.

To best deliver your employees' retirement system, PERS needs your partnership.

In the past, PERS mostly communicated with EDX reporters and payroll specialists who report member data. Employers report critical payroll and demographic information at every point in a member's career — from the day the employee is hired to the day that individual separates from the employer. This information is used to determine eligibility for retirement benefits.

As PERS works to improve our stakeholder communications, **we need your help to reach a broader selection of employer contacts**, including people who work in finance and accounting, HR, internal communications, and other personnel/benefits roles.

Make sure to regularly review your agency or organization's contact information to ensure you are receiving the most relevant information. The easiest way to ensure we have the right employer contacts and the correct targeting data is to sign up for GovDelivery and review your subscriptions and targeting information. Details are included below.

GovDelivery

Each month before PERS sends the employer newsletter, we run a query to add newly entered EDX contact information into GovDelivery, our mass email communications system. If your organization's Web Administrator has entered any new roles into EDX, such as a Payroll Specialist, Reporting Official, Personnel, Payroll, or Other, that new contact **will be uploaded into GovDelivery with targeting details included**.

At any time, you can review or update your GovDelivery targeting preferences and encourage other colleagues to sign up for PERS employer news and other updates directly:

1. Go to https://public.govdelivery.com/accounts/ORPERS/subscriber/new.

2. Enter your email address.

3. Choose any topics on which you would like to receive updates.

   We strongly recommend that all PERS-participating employers who interact with PERS (the agency) sign up for "Employer News/Employer Announcements," at a minimum. That is the list we use to send this monthly newsletter. You will also be signed up for this list automatically if your contact information is correctly entered into EDX.

   Next, you can **update your subscriber preferences**.

4. **OPTIONAL, BUT IMPORTANT:** At this point, GovDelivery may promote the opportunity to receive updates from other public agencies. Whether on this page or when you initially log in, click "Subscriber Preferences" to make sure your targeting information is correct.

   From the Subscriber Preferences page, **click the "Questions" tab to target your GovDelivery emails in the future**.

Subscriber Preferences

| Subscriptions | Preferences | Questions |

Subscriptions

You are subscribed to the following topics:

Topic	Check to Delete
EDX Availability	☐
Employer News/Employer Announcements	☐
Employer Rate Relief Programs	☐
PERS Administrative Rulemaking	☐
PERS Expo 2019	☐
Senate Bill 1049 Information	☐

Submit   Cancel

5. Review your "Questions."

    GovDelivery uses Questions to allow PERS, when applicable, to send specific emails to certain groups of employer contacts. **PERS will continue to send all employer news updates to anyone who checks "I am the primary employer contact for all PERS matters."**

How does PERS plan to use employer targeting information?

PERS recognizes that we need to better inform our employers and reach the right contacts with information relevant to their needs.

For example, as we continue to make progress developing the UAL Resolution Program (UALRP) and other Employer Rate Relief Programs, including future rounds of the Employer Incentive Fund (EIF), we plan to target "financial or other accounting roles" that likely have authority for budget-related decisions and may best understand employer contribution rates and UAL information.

Please indicate which category best describes your organization(s). Select multiple categories as needed.	
	☑ State Agency
	☐ University
	☐ City
	☐ County
	☐ Special District / Other Local Government
	☐ Community College
	☐ School District (K-12 or Charter School)
What is your job function as it relates to PERS? Check all that apply.	☐ Payroll Specialist / EDX Reporter
	☐ Financial or other accounting roles
	☑ Human Resources / Personnel
	☐ Agency Head / Executive / Administrator
	☑ I am the primary employer contact for all PERS matters

We also recognize that we need to do a better job partnering with our employers to get information to all PERS members. Because the current EDX system (**where PERS gets all data about newly hired members**) does not have a place to enter a personal email address, PERS does not have contact information for the majority of our members. We need your help in:

• **Encouraging your employees to sign up for GovDelivery email or text updates.**
• **Forwarding information we share to "human resources/personnel" contacts**, such as our three-times-a-year member newsletters (April 1, August 1, and December 1).

Thank you for your partnership to help us best inform our employers and members about important information, especially as we share more updates in the coming months about Senate Bill 1049.

Updating contact information in EDX

EDX stores employer contact information for all authorized users and other contacts identified for your organization. Because GovDelivery is a separate system, **it is still important to keep your EDX contact information updated**, especially for individual employer communications and updates.

This information has two primary purposes:

1. PERS staff members use it to call, mail, fax, or email employer reporting contacts.

2. EDX uses it to send automated email notifications.

Your **Web Administrator** role has sole administrative control over EDX reporting for your organization, including maintenance and authorization of all other employer contacts and user accounts. Only the Web Administrator can grant login privileges to new payroll specialists in your organization. If your Web Administrator does not assign an Employer Reporting 1 contact, then all EDX email notifications will go to the Web Administrator.

Contact role types:

There are two key reporting roles in EDX.

- **Web Administrator** — The Web Administrator activates, deactivates, and resets employer account passwords. In addition, he or she has the authority to unlock accounts and update account profile information. Every employer has a Web Administrator.

- **Payroll Specialist** — A Payroll Specialist uses EDX to set up his or her own account(s). The Web Administrator can assign up to 15 individuals to serve as payroll specialists. Most employers will also have at least one Payroll Specialist who uses EDX for payroll cycle reporting.

While the Web Administrator and Payroll Specialist(s) serve in key reporting roles, employers may also designate the following roles to specific personnel if they exist in your organization:

- **Reporting official** — Typically the head of the agency.

- **Personnel** — Typically the PERS contact in the human resources department.

- **Payroll** — Typically the PERS contact in the payroll department.

- **Other** — Anyone an employer chooses to grant EDX access. An employer might choose this role for an individual it wants to have limited EDX access.

Because a Web Administrator has access to more EDX functions than a Payroll Specialist, there are two additional links available on the left navigation pane in EDX when a Web Administrator logs in:

- Work with Contacts

- Admin Web Accounts

By adding contact information, you can develop a contact list of employees in your organization who are authorized to use EDX, and you can assign a reporting role to each authorized user.

Important: Adding contact information <u>does not</u> create an EDX user account. Only an individual requesting EDX access can create a user account.

On the **Work with Contacts** page, a Web Administrator is able to add and delete contacts and update addresses, telephone numbers, and email addresses. Click "Add a New Employer Contact" (or click the contact type) to select the contact you want to edit. Modify the contact information as needed and save.
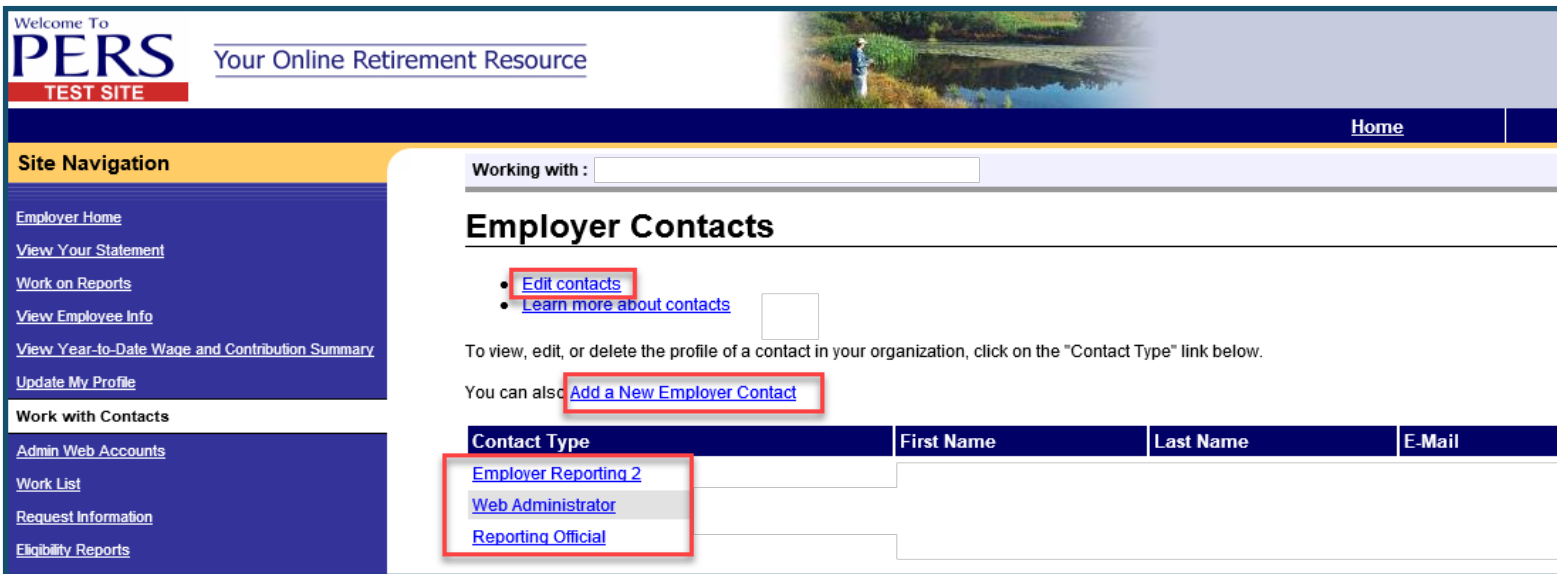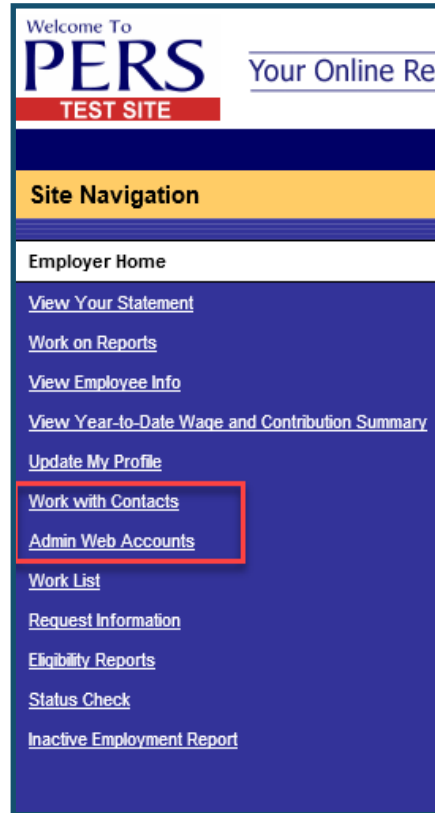
On the **Admin Web Accounts** page, a Web Administrator is able to activate, deactivate, and update a Payroll Specialist profile.

SB 1049 updates: Partial-year salary limits

Find full information on https://www.oregon.gov/PERS/EMP/Pages/Partial-Year.aspx.

Starting in 2020, if you employ a member for **less than 12 months in a calendar year**, the member's subject salary will be limited based upon a "partial year" average limit of $16,250 a month* (including any eligible lump-sum payments for Tier One/Tier Two members).

Prior to 2020, only OPSRP members (hired after August 28, 2003) were impacted by partial-year salary limits. Beginning January 1, 2020, partial-year salary limits apply to all members (Tier One, Tier Two, and OPSRP).

You can calculate the "partial-year" limit by counting the **number of months of active membership** for the employee, divided by 12 months, and then multiply that fraction by the annual salary limit ($195,000* in 2020). **Use the chart below to find the 2020 partial-year limit**.

Partial-year salary limits

Months of "Active Membership"	1 month	2 months	3 months	4 months	5 months	6 months	7 months	8 months	9 months	10 months	11 months	Full Year
Months the Member Worked ÷ 12 = Proration Factor	0.083333	0.166667	0.250000	0.333333	0.416667	0.500000	0.583333	0.666667	0.750000	0.833333	0.916667	1.000000
2020 Partial Year Limits	$16,249.94	$32,500.07	$48,750.00	$64,999.94	$81,250.07	$97,500.00	$113,749.94	$130,000.07	$146,250.00	$162,499.94	$178,750.07	$195,000.00*

The limit is indexed annually to the Consumer Price Index (CPI) [All Urban Consumers, West Region].