OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

EMPLOYER NEWSLETTER

Work After Retirement wage codes delayed

As a result of challenges PERS has faced during system programming for new Work After Retirement functionality, we had to delay the deployment of our originally scheduled October release.

Work After Retirement programming is now scheduled to be completed in **late November**.

There is nothing for you to do differently now. Continue using wage code 07 to report hours for your working retirees. You will only use the new codes going forward **once we notify you** that the functionality is available.

Work After Retirement action	Responsibility
Recoding retiree hours from wage code 07 to new wage code 17.	PERS Employer Service Center.
Sending invoices for contributions on retiree wages dating back to January 1, 2020.	PERS (automatically through EDX once the new functionality is released).
Using the new wage codes 17 and 18 and modified code 07.	Employers (once notified).

Stay up to date!

COVID-19
- [PERS updates on novel coronavirus (COVID-19)](#)
- [Frequently asked questions about paid leave during the COVID-19 pandemic](#)
- [Loss of work during the COVID-19 pandemic (FAQs for members)](#)

Senate Bill 1049
- [Information for PERS employers](#)
- [Information for members](#)
- [SB 1049 GovDelivery emails signup](#)

Employer rate relief programs
- [Employer rate relief programs webpage](#)

Other topics
- [Choose what GovDelivery emails you'd like to receive](#)

Although the delay is less than a month, we understand the impacts to our PERS-participating employers. We apologize for any challenges this presents. Please contact your [Employer Service Center representative](#) if you have any questions or need support.

Please share this information with your staff.

PERS Expo experience available online

The PERS Expo 2020 website includes videos, checklists, tips, and simple explanations to help members navigate their financial future and chart a course to a successful retirement — whether they are just starting out, in their mid-career, or getting close to retirement.

Encourage your coworkers to take a couple of hours to explore the wealth of information available. The Expo site will continue to be live through at least the end of this year.

Starting your journey

Members in their first five years of public service

START PATHWAY 1

On your way

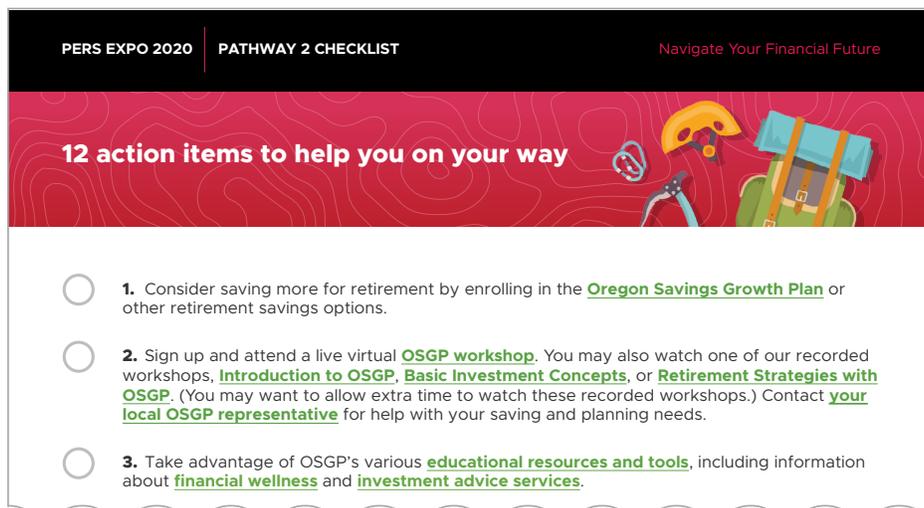Members in the middle of their public service careers

START PATHWAY 2

Approaching the destination

Members planning to retire within the next three years

START PATHWAY 3

The Expo offers different information for public employees based on where they are in their retirement journey. Click on one of the images above to jump directly to that section.

PERS EXPO 2020 | PATHWAY 2 CHECKLIST   Navigate Your Financial Future

12 action items to help you on your way

1. Consider saving more for retirement by enrolling in the **Oregon Savings Growth Plan** or other retirement savings options.

2. Sign up and attend a live virtual **OSGP workshop**. You may also watch one of our recorded workshops, **Introduction to OSGP**, **Basic Investment Concepts**, or **Retirement Strategies with OSGP**. (You may want to allow extra time to watch these recorded workshops.) Contact **your local OSGP representative** for help with your saving and planning needs.

3. Take advantage of OSGP's various **educational resources and tools**, including information about **financial wellness** and **investment advice services**.

RETIREMENT PANEL VIDEO   CLOSE ⊗

OREGON **PERS**
PUBLIC EMPLOYEES RETIREMENT SYSTEM

RETIREMENT DISCUSSION PANEL

What type of investor are you?
To determine what kind of investor you may be, simply answer these questions.

Time Horizon
1. I have long-term financial goals of 10 years or longer.
- Strongly Agree
- Agree
- Disagree
- Strongly Disagree

The Expo includes checklists, videos, and other resources to help you learn more about PERS, the Oregon Savings Growth Plan (OSGP), and the PERS Health Insurance Program (PHIP).

It is year-end reconciliation time

Annual reconciliation is a period each year when employers correct any records that did not post or that need to be changed. It runs from October 1 through February 28 of the following year.

Annual reconciliation is divided into two phases:

- **Phase 1:** October 1 to December 31. Employers correct suspended records and reports for the current calendar year.
- **Phase 2:** January 1 to February 28 of the following year. Employers resolve membership questions for the previous year, continue to correct suspended records and reports, and pay any resulting invoices.

Phase 1

During this phase, employers should:

1. Clear suspended records and reports for calendar year 2020.
2. Check part-time employees' hours to ensure they are 599 or fewer for the year.
3. Submit a demographic correction request (DCR) to PERS for any employee whose position type needs to change from non-qualifying service to qualifying or vice versa for 2020.

Example

Phase 1 is an ideal time frame for education employers to review their substitute teaching staff to identify those who are likely to reach 600 hours of total service for 2020. Remember that reaching 600 hours of total service in any calendar year makes an employee eligible for PERS retirement benefits. Employees who will work 599 or fewer hours do not qualify for retirement benefits.

Instructions

Determine eligibility: If an employee is projected to reach 599 or fewer hours of total service in calendar year 2020, their wage code should be DTL2-02 Regular/Non-Qualifying.

If an employee is projected to reach 600 hours or more in calendar year 2020, their wage code should be DTL2-01 Regular Wages.

Change a position type: To change an employee's position type, submit a demographic correction request (DCR) as follows:

1. Under Site Navigation in the left sidebar on any EDX page, select Work List.
2. Select Create Demographic Correction Request (DCR).
3. Enter the employee's Social Security Number or PERS ID.
4. Click the radio button to select the Job Segment.
5. In the New Position Type field, select either Active Service or Non-Qualifying Service (see image on next page).
6. In the Comments field, explain why you are making the change.

   If you request a position type that will alter the employee's Contribution Start Date (CSD), include the contribution type (MPPT, MPAT, or EPPT).

Continued

Job Segment	Hire Intent	Start Date	Term/End Date	Last Day Service	Job Class	Position Type	Plan	Average OT Hours	Contract No. of Months	Unused Sick Leave
1	NQ	07/01/2019								
⦿		07/01/2019			School Employee	Non-Qualifying Service	OPSRPDB	100	12	

Start Date From 07/01/2019 **To** [ ]

Term/End Date From ⦿ **To** [ ] ○ Remove Term/End Date

Last Day Service From **To** [ ]

Job Class From School Employee **To** [▾] **Start Date** [ ] **End Date** [ ]

New Position Type [Active Service ▾] **Start Date** [ ] **End Date** [ ]

Average OT Hours [▾]

Contract No. of Months [▾]

Hire intent [▾]

Unused Sick Leave [ ]

Review Contribution Start Date ☐

Delete Position ☐

Comments [Employee worked more than 599 hours this year and is now Active Service.]

[Save] [Cancel]

7. Click Save.
8. Once your ESC representative updates the member's account with the corrected position type, you will receive an EDX email message stating your DCR is complete.

Position type   Indicates whether or not the position qualifies for retirement benefits, which is based on how many hours the employee will work in a year. For qualifying positions with a "hire intent" of 600 hours/year or more, choose "active service," and for positions with a hire intent of fewer than 600 hours/year, choose "non-qualifying."

For assistance

For help with this task or to learn more, contact your ESC representative.

Reminders about Member (IAP) Redirect

Voluntary contributions retroactive option has ended

The window for members to make Senate Bill 1049 voluntary contributions to their IAP account retroactive to July 1, 2020, has closed. However, members can choose to elect to make contributions going forward at any time.

Voluntary contributions instructions

For instructions on beginning (or ending) a member's post-tax deduction, read "How to Manage an Employee's Voluntary Contribution."

Work List

Below is a list of employees for which PERS is requesting Information. The Work Item Type indicates the type of information that is required. Please complete and return each Work Item. Click on the SSN to enter salary information.

Create Demographic Correction Request (DCR).

Learn more about working with Work List

Click on the leftmost column to get the detail of the clicked record.

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SSN	PERS ID	Last Name	First Name	Plan	Year	Request Date	Work Item Type	Status
▬	▬	▬	▬	OPSRPDB		08/21/2020	IAP Voluntary Contribution	New
▬	▬	▬	▬	PERS-Tier 2		08/18/2020	IAP Voluntary Contribution	New
▬	▬	▬	▬	OPSRPDB		08/18/2020	Stop-IAP Voluntary Contribution	New

For assistance

If your employees have any questions about voluntary contributions, they can email Member Services. If you have questions about managing an employee's voluntary contribution in EDX, contact your ESC representative.

Find actuarial valuations and rates online

To access your agency's valuation (a report that explains the data and calculations used to set your contribution rates for 2021–23), go to the PERS' Actuarial Valuations webpage and follow the instructions.

To go directly to review your 2021–23 contribution rate, go to the Contribution Rates webpage.

Actuarial Valuations

Every even-numbered year, PERS publishes actuarial valuation reports for every PERS-participating employer, in addition to a system-wide valuation report. These reports are calculated and created by PERS' consulting actuary based on information gathered the previous (odd) year.

Valuations provide details on your Employer Contribution Rates for the upcoming biennium.

Tip: Searching for content on the PERS website

Can't find what you are looking for on the PERS website? Try doing a search.

The PERS website has a search bar that is available at the top of every page. Click in the white box and enter the name of what you are looking for, such as "valuation," "test site," "rate projection tool," or whatever you need. A list of web pages that contain your search terms will pop up. Click on the page you choose or click the X in the upper-right corner to close the window and try a different search.

OREGON.GOV | Home | News | Contact Us | OSGP Deferred Comp | Financials | Most Requested Forms | PERS Health Insurance | [ ] 🔍

EDX tip of the month: Tools for year-end reconciliation

Eligibility reports

Members Approaching Qualifying Hours Report displays members who:

1. Have 550 or more posted hours with all employers in the specified year.
2. Have two or more DTL2 non-qualifying wage records posted in the specified year.
3. Are not retired in the specified year.

Members with Contributions Who May Not Qualify Report displays members who have:

1. Fewer than 600 hours with all employers in the specified year.
2. Contributions reported in the specified year.
3. Active status (i.e., are not retired in the specified year).

Note: These reports do not consider partial-year exceptions. To learn more about partial-year eligibility rules, read the document "Qualifying Position Determination."

Site Navigation
- Employer Home
- View Your Statement
- Work on Reports
- View Employee Info
- View Year-to-Date Wage and Contribution Summary
- Update My Profile
- Work with Contacts
- Admin Web Accounts
- Work List
- Request Information
- **Eligibility Reports**
- Status Check
- Inactive Employment Report

Filter Your Report by Year

Enter year (YYYY): [ ]

Members Approaching Qualifying Hours — **Download CSV File**

Members with Contributions Who may not Qualify — **Download CSV File**

For assistance

Contact your ESC representative if you have any questions on this topic.