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EMPLOYER NEWS

OCTOBER 2021

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Senate Bill 111A preview

SB 111A*, passed in June 2021, changes the definition of "salary" for OPSRP members to include salary paid to non-Oregon residents who are working out of state for a PERS-covered employer. This means that employees can live and work out of the state or even out of the country for a PERS-participating employer and earn contributions toward their future retirement. The change goes into effect on January 1, 2022, but applies to wages earned since January 1, 2020 (and farther back for charter school and OHSU employees who are PERS members).

*A = amended

Who is affected

Members: PERS-participating employees who are (or were) working out of state for at least 600 hours a year in a qualifying position and whose salary was not previously counted toward their pension, IAP, and final average salary (FAS).

Employers: Employers who identified employees who are (or were) PERS members who were working out of state and reported those employees' pay as non-subject salary. These employers will need to change the reporting to subject salary going back to January 1, 2020 (see below for charter schools and OHSU retroactive date). Employers will then be invoiced for all contributions (i.e., employer rate contributions, IAP contributions, and voluntary contributions, if applicable) due on those employees' salaries.

What is affected

Members: PERS members working out of state in a qualifying position who were not receiving contributions on their salary may get a boost toward their IAP, pension, and FAS.

Employers: Once employers identify affected employees and change their salary from non-subject to subject salary, they will be invoiced for all contributions, employer rate contributions, IAP contributions, and voluntary contributions, if applicable, due on those employees' salaries back to January 1, 2020 (including those who retired or stopped working for you after that date).

What is not affected

SB 111A does not affect service time earned, eligibility for benefits, or vesting. These are based on hours worked, not salary.

If you were already reporting these employees' salaries as subject salary and paying contributions (whether correctly or incorrectly), there is no need to change any reporting.

For charter school employers

At the request of charter schools, this salary change has been made retroactive back to August 29, 2003. This means that an out-of-state member employee's salary will be considered subject salary for periods they were continuously employed with the charter school (i.e., periods with no break of 30 days or more) back to 2003.

Note: This does not apply to employees who worked outside the United States between August 29, 2003, and December 31, 2019.

For OHSU employers

At the request of OHSU, this salary change has been made retroactive back to August 29, 2003. This means that an out-of-state employee's salary will be considered subject salary for the time they were continuously employed with OHSU (i.e., periods with no break of 30 days or more) back to 2003.

Next steps

PERS is still implementing this bill and will share more information with employers as details are worked out.

For now, be aware of those non-Oregon resident employees in your organization who are currently working out of state, and anticipate reporting their salary and being billed for contributions for those employees. Employers are responsible for correcting posted wage records — PERS will not identify these employees.

Learn more

Read the bill on the Oregon Legislature website.

Two new additions to EDX functionality in mid-October

1 **Notification of a new employee's active voluntary contribution election.**

When you submit a DTL1 new-hire record for someone who already has an existing and active voluntary contribution election, you will receive a work-list email notification from EDX. The work-list item will inform you to start deductions for the new employee before the first invoice.

Example

On 9/1/2021, XYZ School hired a new employee named Kim. Kim had previously elected to participate in voluntary contributions effective 11/1/2020. When XYZ submits a DTL1 new-hire record for Kim, the employer reporter receives an email notification stating that there is a new request for information on XYZ's work list.

> Employer Reporting Contact for [employer ID],
>
> You have a new request for information on your Work List. To view this request, log in to EDX and click on the Work List activity under the menu on the left side of the page.
>
> Items requested for: IAP Voluntary Contribution
>
> [employee ID]   Smith, Kim
>
> [employee ID]   Jones, Joe
>
> Thank you in advance for providing the requested information. If you have any questions, please contact your PERS Account Representative or the Employer Service Center at 503-603-7788 (1-888-7377 toll free).

Continued

Working with :

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.

SSN	PERS ID	Last Name	First Name	Plan	Year	Request Date	Work Item Type	Status
				PERS-Tier 2		06/16/2011	Termination	New
				PERS-Tier 1	2000	09/02/2021	Salary Breakdown	Pending
				OPSRPDB		09/14/2021	IAP Voluntary Contribution	New
				OPSRPDB		09/14/2021	IAP Voluntary Contribution	New
				PERS-Tier 1		09/14/2021	IAP Voluntary Contribution	New
				PERS-Tier 1		09/13/2021	IAP Voluntary Contribution	New
				OPSRPDB		09/13/2021	IAP Voluntary Contribution	New

Working with :

IAP Voluntary Contribution Request

Status New

Details For:

IAP Voluntary Contribution Effective Date 11/01/2020
Request Date 09/13/2021
Plan PERS-Tier 1
IAP Redirect % 2.50
Concurrent Employment No

○ Save work in progress
○ IAP Voluntary Contribution deductions established

Save   Cancel

View IAP Voluntary Contribution Report

The IAP Voluntary Contribution Report is another good resource to see which employees have started or stopped voluntary contributions.

Working with :

This report lists all employees who have IAP Voluntary Contribution Election(s).

Learn more about IAP Voluntary Contribution reports.

IAP Voluntary Contribution Report   Year (YYYY) [   ]   Download CSV File

	A	B	C	D	E	F	G	H	I
1	ER#	Year 2021 SL3							
2	SSN	PERS ID	Last Name	First Nam	VCED	VCSD	Plan	% by Plan	
3					9/1/2021		OPSRP	0.75	
4					7/1/2021		OPSRP	0.75	
5					1/1/2021		OPSRP	0.75	
6					12/1/2020		TIER 2	2.5	
7					7/1/2020		OPSRP	0.75	
8					12/1/2020		OPSRP	0.75	
9					11/1/2020		OPSRP	0.75	
10					7/1/2020		TIER 2	2.5	

Continued

2 ## New Total IAP column

Both the Year-to-Date (YTD) View Totals screen and the Year-To-Date Wage and Contribution Summary screen will have a new column called Total IAP. The column provides a quicker view of the total amount contributed to the employee's Individual Account Program (IAP) account so far that year, not including their voluntary contributions.

Current view

Currently, the view only displays the IAP Voluntary Contributions total column and a Total Member Contributions column, which includes the grand total of both the 6% IAP contributions and the 2.5% (Tier One/Two) or 0.75% (OPSRP) voluntary contributions.

Year-to-Date Wage and Contribution Summary

Year: 2021 Employer Number: Employer Name:

Select a Member: [ ] Go Sort by Last Name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Today: 09/17/2021

View Original Results   View Totals   Download as CSV   Print Report

Page # 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17

SSN	Last Name	First Name	Hire Date	Contrib Start Date	EDX Records	Hours this ER	Hours Other ERs	Lump Sum Payoff	Lump Sum Vacation Payoff	Unit Contri- butions	Optnl ER IAP	IAP Vol Contribs	Non-Subj Salary	Subject Salary	Gross Salary	Total Membr Contribs
			05/14/2001	12/01/2001	Posted	1,440.00	0.00	$0.00	$0.00	$0.00	$0.00	$2,926.82	$0.00	$123,676.62	$123,676.62	$10,347.44
			12/20/2017	07/01/2018	Posted	1,482.00	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$31,281.81	$31,281.81	$1,876.90
			08/03/2015	02/01/2016	Posted	1,078.00	0.00	$0.00	$12,473.20	$0.00	$0.00	$0.00	$0.00	$73,450.13	$85,923.33	$4,407.00
			05/11/2016	12/01/2016	Posted	1,439.25	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$35,679.54	$35,679.54	$2,140.77
			01/05/2009	08/01/2009	Posted	995.50	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$66,340.62	$66,340.62	$3,980.41

New view with enhancement

After the EDX enhancement release in mid-October, employers will see an additional column in both the YTD summary screen and View Totals screen. This new column will have total 6% IAP contributions only. The Total Member Contributions column will be the combined total of all member contributions (6% IAP and voluntary contributions).

Year-to-Date Wage and Contribution Summary

Year: 2021 Employer Number: Employer Name:

Select a Member: [ ] Go Sort by Last Name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Today: 09/13/2021

View Original Results   View Totals   Download as CSV   Print Report

Page # 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17

SSN	Last Name	First Name	Hire Date	Contrib Start Date	EDX Records	Hours this ER	Hours Other ERs	Lump Sum Payoff	Lump Sum Vacation Payoff	Unit Contri- butions	Optnl ER IAP	Total IAP	IAP Vol Contribs	Non-Subj Salary	Subject Salary	Gross Salary	Total Membr Contribs
			05/14/2001	12/01/2001	Posted	1,360.00	0.00	$0.00	$0.00	$0.00	$0.00	$7,024.45	$2,926.82	$0.00	$117,073.74	$117,073.74	$9,951.27
			12/20/2017	07/01/2018	Posted	1,402.00	0.00	$0.00	$0.00	$0.00	$0.00	$1,774.18	$52.64	$0.00	$29,569.86	$29,569.86	$1,826.82
			08/03/2015	02/01/2016	Posted	1,078.00	0.00	$0.00	$12,473.20	$0.00	$0.00	$4,407.00	$0.00	$0.00	$73,450.13	$85,923.33	$4,407.00
			05/11/2016	12/01/2016	Posted	1,359.75	0.00	$0.00	$0.00	$0.00	$0.00	$2,018.22	$61.40	$0.00	$33,637.10	$33,637.10	$2,079.62
			01/05/2009	08/01/2009	Posted	922.75	0.00	$0.00	$0.00	$0.00	$0.00	$3,672.30	$113.98	$0.00	$61,205.46	$61,205.46	$3,786.28

Learn more

For more information about these changes, contact your ESC representative.

It's time for 2021 reporting reconciliation

The start of October kicks off year-end reporting reconciliation. The purpose of this annual exercise is to ensure that your employees' records are accurate before they are posted for the year.

There are two phases to year-end reconciliation.

Phase 1, correcting suspended records: October 1 through December 31, correct any suspended records and reports for calendar year 2021. Suspended records are any records that encountered an error and did not process. You can do this by searching for unposted reports.

Phase 2, amending position eligibility: January 3 through February 28, resolve membership issues for calendar year 2021, make any required record corrections, and pay any resulting invoices. You can check employee eligibility by looking up eligibility reports.

Phase 1

Phase 1 is an ideal time to check your part-time employees' hours and ensure they will be in-line with the hours intended for that position. Reaching 600 hours of total service in any calendar year changes non-qualifying service position types to active service (qualifying) position types.

If you find any employees who have reached or are likely to reach 600 hours this year, submit a demographic correction request (DCR) to PERS requesting that the position type be changed from non-qualifying service to active service (example screen shown on p. 7).

Conversely, if an employee's current position type is qualifying active service and they are not projected to reach 600 hours of total service in 2021, their position must be changed to non-qualifying service by submitting a DCR to PERS.

Instructions

To find the hours to date for your employees, use the Eligibility Reports and Year-to-Date Wage and Contribution Summary functions in EDX, which are in the Site Navigation toolbar on the left-hand side of the EDX homepage.

View Year-to-Date Wage and Contribution Summary

The Year-to-Date Wage and Contribution Summary report displays wage, hour, and contribution information for employees with posted DTL2 records. It includes concurrent total hours worked with additional PERS employers.

Eligibility Reports

This function enables you to run two types of reports.

1. Members Approaching Qualifying Hours Report displays members who:

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

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
- View IAP Voluntary Contribution Report

Continued

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

   - Have fewer than 600 hours with all employers in the specified year.
   - Have contributions reported in the specified year.
   - Are not retired in the specified year.

Note: These reports do not look at partial-year rules.

EDX tip: Changing position type

The position type that an employee is assigned in EDX determines if they will earn contributions toward retirement and if their employer(s) will pay those contributions to PERS.

To ensure employees have the correct position type, you need to check their hours each year. If an employee's hours are not in line with the position type, fill out a DCR to ask PERS to change that employee's position type.

For employees who work for more than one employer, all hours they worked for PERS-participating employers are included, not just the hours they worked for you. If they surpass 600 hours in a full calendar year, a DCR may need to be submitted to update the position type to active service.

Once we receive the DCR, we will change the employee's position type for you, as shown below.

Position types

- Non-qualifying service position: Fewer than 600 hours a calendar year.
- Active service position: 600 hours or more per calendar year.

Position History:

Remove Position	Plan	Job Class	Position Type	Start Date	End Date	Contribution Type	Avg OT	Cntr No Mnths	Verified
☐	OPSRPDB ▾	General Service ▾	Active Service ▾	01/01/2021		▾	100 ▾	00 ▾	☐
☐	OPSRPDB ▾	General Service ▾	Non-Qualifying Service ▾	01/22/2018	12/31/2020	▾	100 ▾	00 ▾	☐

How to check hours

Run an eligibility report to identify employees who may need a different position type.

Employee Eligibility Exception Reports

The reports below can be used to determine if corrective action is required to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions.

Please note that these reports are only updated once a week. When viewing the CSV file, the header row will state the date the information was pulled from the system.

Learn more about eligibility reports

Filter Your Report by Year

Enter year (YYYY): 2021

Members Approaching Qualifying Hours   **Download CSV File**

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

Continued

Invoicing

Once a position type is changed from non-qualifying service to active service, you may be invoiced for contributions on that employees' wages back to hire date, contribution start date, or beginning of the year.

If you were paying contributions for an employee whose position type changes to non-qualifying service, you may be refunded for contributions that were not due for that calendar year.

Submit a DCR

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 next to the employment segment you want to correct.
5. In the Position Type field, use the drop-down menu to select the new position type.
6. In the Comments box, enter the correct position type and why you are changing it.
7. Click Save.
8. Once your ESC Account Team representative updates the member's account with the corrected position type, you will receive an EDX email message stating your DCR is complete.

Working with :

Demographic Correction Request

SSN/PERS ID [_____] [Search]

Learn more about working with Demographic Correction Request

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	08/26/2021								
⊙		08/26/2021			General Service	Non-Qualifying Service	OPSRPDB	100	0	

Start Date From 08/26/2021   To [_____]

Term/End Date From ○   To [_____] ○ Remove Term/End Date

Last Day Service From   To [_____]

Job Class From General Service   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 has surpassed 600 hours this year. Please change position type to active service for 2021. Contribution type MPPT.]

[Save] [Cancel]