



Reporter Roles and **EDX** Access

Employer Reporting Guide

This guide explains how to learn the EDX reporting system, create an account, log in, update your account, and understand your responsibilities.

**Employer
Service
Center**



Contents

Introduction.....	3
EDX roles.....	4
Learning how to use EDX.....	4
PART 1 – THE WEB ADMINISTRATOR.....	5
Getting started	5
Getting an account	5
Logging in	6
Troubleshooting your account.....	6
Updating your account information	8
Managing EDX access	9
Managing the contacts list	9
Managing employer reporter accounts	12
PART 2 – THE EMPLOYER REPORTER.....	14
Getting started	14
Getting an account	14
Logging in	15
Troubleshooting your account.....	15
Updating your account information	16
Reporting to PERS.....	19
Learning how to report.....	19
Getting reporting help.....	20

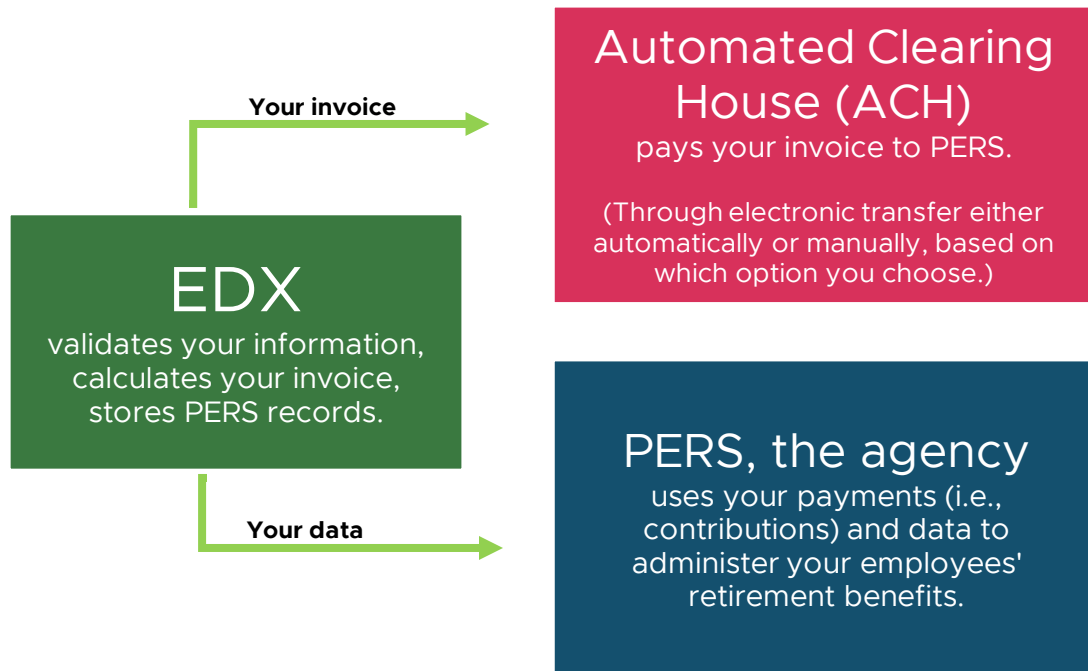
Revised November 2023

Introduction

Employer Data Exchange (EDX) is a secure, web-based tool that employers use to report their employees' hours, wages, and demographic information to PERS on a payroll-cycle basis.

EDX takes the financial information you feed it and automatically calculates what you owe each month to pay for your employees' future PERS benefits. It also validates and stores your employees' information, which PERS uses to calculate their benefits when they retire or withdraw.

The process flows like this:



EDX roles

Every employer must assign the following roles:

Web administrator. Every employer has one web administrator who is responsible for managing the employer's EDX account.

Employer reporter. Every employer has at least one employer reporter (who may also be the web administrator, in a small agency). Employer reporters are responsible for entering employee data into EDX.

These are the only roles who can access the employer's PERS account.

This guide explains the responsibilities of these two roles and how they can get started using EDX.

Learning how to use EDX

Every PERS-participating employer has a web administrator and up to 15 employer reporters authorized to use EDX. To help you learn how to use EDX, the PERS Employer Service Center (ESC) offers written manuals, instructor-led training, and on-demand training videos (coming in 2023). Once you understand how to report in EDX, your ESC representative can help you answer questions and solve issues.

Materials and resources

- [Employer reporting guides](#).
- [Employer training](#).
- [Employer Service Center representatives](#) (for one-on-one assistance).

PART 1 – THE WEB ADMINISTRATOR

Getting started

The web administrator is assigned the role by their organization’s “reporting official.” The reporting official is someone in their organization who has the authority to make financial decisions, such as the agency head, principal, fire chief, chief financial officer, or board member.

Getting an account

A new web administrator must request an account from PERS as follows:

- 1 Fill out the [Web Administrator Agreement form](#). For instructions, read the [Web Administrator Agreement Form Instructions web page](#).
- 2 Print the form, sign it, and have your reporting official sign it.
 - The reporting official is the head of the organization or someone who makes financial decisions. The form cannot be signed by the outgoing web administrator.
- 3 Submit the form to the PERS Employer Service Center. There are four options:

Fax	503-598-0561
Scan and email	PERS.EDX.Support@pers.oregon.gov
Mail	PO Box 23700 Tigard, OR 97281-3700
Drop it off at PERS	11410 SW 68th Parkway Tigard, OR 97223 Office hours: Monday - Friday, 8 a.m. - 5 p.m. Directions to the Tigard office

An ESC representative will ensure you filled out the form correctly and had it signed by a reporting official with financial authority at your agency. They will then send you a web admin user ID and temporary password.

Logging in

You can now log in to [EDX](#). Enter your user ID and password and hit Enter or click **Log In**.

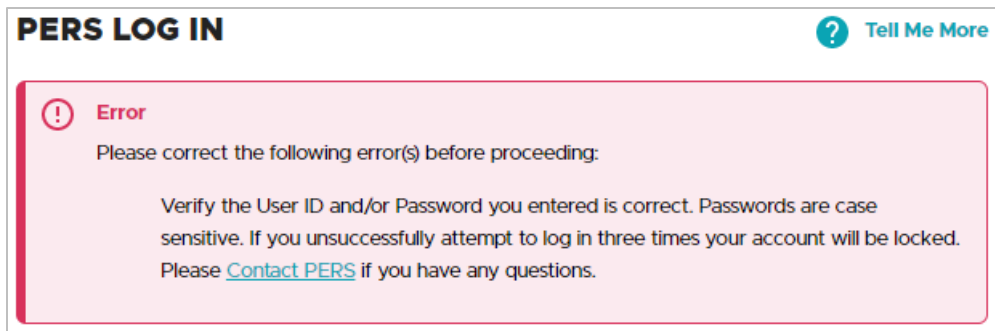


The screenshot shows a login form titled "PERS LOG IN". Below the title is the instruction "Enter your User ID and Password below." There are two input fields: "User ID" and "Password". At the bottom left of the form is a blue button with a right-pointing arrow and the text "Log In".

Troubleshooting your account

Trouble logging in

If you enter the wrong user ID or password, you will receive an error warning.



The screenshot shows the "PERS LOG IN" form with a red error message box. The error message reads: "Error Please correct the following error(s) before proceeding: Verify the User ID and/or Password you entered is correct. Passwords are case sensitive. If you unsuccessfully attempt to log in three times your account will be locked. Please [Contact PERS](#) if you have any questions." In the top right corner of the form, there is a "Tell Me More" link with a question mark icon.

If you enter an incorrect password and/or user ID three times, EDX will lock your account and display the message below.

Multiple unsuccessful log in attempts. Your account is now locked.

Please contact PERS at PERS.EDX.Support@pers.oregon.gov to reset your account.

Unlocking your account

Contact PERS to have your account unlocked. You can email the [Employer Support inbox](#) or [contact your ESC representative](#).

Changing your password

Passwords expire after 90 days, requiring you to create a new one. Fifteen days before your password expires, a warning message (like the one shown below) will start appearing at the top of the Employer Home Page screen to tell you how many days remain before your current password is invalid.

Warning

Your password will expire in 8 days. To update your password: click on the 'Update My Profile' link, enter your password in the password field and the confirm password field, and then click 'OK'

Before your password expires, you can update it by selecting **Update My Profile** from the main Site Navigation. Enter and confirm your new password.

Your password must be composed of the following.

- At least seven characters.
- Three of these character types:
 - a. An uppercase letter (A–Z).
 - b. A lowercase letter (a–z).
 - c. A numeral (0–9).
 - d. A special character (e.g., !, #, @, %).

It must not contain three or more consecutive characters from your user ID.

Changing your expired password

If you do not change your EDX password before it expires, the next time you try to log in, EDX will prompt you to enter a new password.

Updating your account information

To change your email address, update your password, or add employers to your list, use the Update My Account function.

On the Update My Account Profile screen, enter your new email address, confirm the email address, add any other required information, and click **NEXT**.

The screenshot shows a web interface for an employer. On the left is a 'SITE NAVIGATION' menu with options like 'Employer Home', 'View Your Statement', 'Work on Reports', 'View Employee Info', 'View Year-to-Date Wage and Contribution Summary', 'Update My Profile' (highlighted with a red box), 'Work List', 'Request Information', 'Eligibility Reports', 'Status Check', 'Inactive Employment Report', and 'View IAP Voluntary Contribution Report'. The main header shows 'BS BIG SCHOOL #1' with 'Employer Number:' below it. The main content area is titled 'UPDATE MY ACCOUNT PROFILE' and contains a description: 'This page will allow you to update your Web account information. You can update your e-mail address, change your password and request additional employers to work with.' Below this is a note: '* - indicates required fields.' The form fields include: 'User ID' (text input), 'Password*' (password input with a 'Password Requirements' link), 'Confirm Password*' (text input), 'First Name' (text input), 'Middle Initial' (text input), 'Last Name' (text input), 'Email*' (text input), 'Confirm Email*' (text input with a placeholder '(e.g., 10000,20000,3000)'), and 'Employer Numbers*' (text input). A note below the last field states 'At least one Employer Number is required.' A blue 'NEXT' button is at the bottom.

Managing EDX access

The web administrator serves a vital role that goes beyond unlocking accounts and resetting passwords. They are also responsible for protecting the security of your EDX account and access to the personnel data in that account.

The person in this role:

- Controls the employer's EDX account.
- Updates the contacts on the Employer Contacts screen. Only the people listed as an employer contact may discuss the agency's account with PERS.
- Controls the employer reporter accounts (up to 15 accounts).
- Activates, in-activates, and resets employer account passwords.
- Unlocks accounts.

Managing the contacts list

In addition to activating employer reporter accounts, web administrators also designate the following reporting roles to specific personnel (if they exist in the organization). These roles cannot access or change employer data through EDX, but they must be listed on the contact list for PERS to discuss your organization's account with them.

Reporting Official — Typically the head of the organization or someone authorized to make financial decisions for the organization.

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 list as another contact.

Third-party administrator (TPA) access

If a web administrator authorizes a TPA (e.g., a certified public accountant) to have EDX access or be listed as a contact, it is up to the web administrator to ensure the TPA understands the EDX reporting process.

How to add a contact

- 1 Log into EDX.
- 2 Choose the **Work with Contacts** function from the main menu to display the Employer Contacts screen.
- 3 Click the **Add a New Employer Contact** button to display the Employer Contacts Details screen.
- 4 Click on the Contact Type pull-down menu and select a contact type from the list. (See image on next page.)
- 5 Type the person's information into the required First Name, Last Name, Telephone, and Email text boxes.
- 6 Click the **Save** button. You are returned to the Employer Contacts screen.

- 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

EMPLOYER CONTACTS DETAILS

* - indicates required fields.

Contact Type

SSN

First Name*

Middle Initial

Last Name*

Address 1

Address 2

Address 3

City

State

Zip -

Telephone* **Ext**

Fax

Email*

- Payroll
- Employer Reporting 1
- Employer Reporting 2
- Reporting Official
- Personnel
- Employer Reporting 3
- Employer Reporting 4
- Employer Reporting 5
- Employer Reporting 6
- Employer Reporting 7
- Employer Reporting 8
- Employer Reporting 9
- Employer Reporting 10
- Employer Reporting 11
- Employer Reporting 12
- Employer Reporting 13
- Employer Reporting 14
- Employer Reporting 15
- Web Administrator

How to edit contact information

- 1 Click on the **Work with Contacts** function. The Employer Contacts screen opens.
- 2 Click a contact type in the Contact Type column to select that person. The Employer Contacts Details screen opens, displaying the details of the selected contact.
- 3 To change a contact's type, click the Contact Type drop-down menu and choose a role.
- 4 To change demographic information, enter the new information in the appropriate box.

Note: The web administrator cannot change a contact's name or Social Security Number. Contact your ESC representative to make this change.

- 5 Click **Save** at the bottom of the screen.

How to delete a contact

Any time someone on your Employer Contacts list is no longer serving as an employer contact, they need to be removed from your list.

Note: This applies only to contacts who *do not* have EDX access. To remove a contact who has EDX access, go to the "In-activating an employer reporter account" section in this guide.

To delete a contact:

- 1 Follow steps 1 and 2 above.
- 2 Click the **Delete** button at the bottom of the screen.
- 3 The Contact Delete Confirmation screen confirms deletion. Click **OK** to delete the contact.

CONTACT DELETE CONFIRMATION

Please confirm the deletion. Click "OK" to delete the contact or "Cancel" to cancel the delete process.

Managing employer reporter accounts

How to activate an employer reporter account

As the web administrator, it is your responsibility to take appropriate measures to verify the identity of anyone requesting access to the EDX website before activating an employer reporter account.

- 1 Log into EDX.
- 2 Select the **Admin Web Accounts** function to open the Maintain Employer Web Accounts screen.
- 3 Locate the new user's account under the Pending User Accounts section. Click the "yes" link under the Activate? column that corresponds to that account. The Choose a Contact Type screen opens.

MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
12345	John		Smith	john.smith@company.com	yes	yes	n/a
67890	Jane		Johnson	jane.johnson@company.com	yes	yes	n/a
11111	Tom		Tom	tom.tom@company.com	yes	yes	n/a
22222	Tom		Tom	tom.tom@company.com	yes	yes	n/a

PENDING USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
33333	John		Smith	john.smith@company.com	yes

- 4 Click the Contact Type pull-down menu and select the contact type you want to apply to the new employer reporter account.
- 5 Click the **Create** button to open the Status Change Confirmation screen.
- 6 The Status Change Confirmation screen confirms the account status is now active.
- 7 Once you activate the account, notify the new user that the account is now active. The user can immediately log on to EDX.

How to unlock an employer reporter account

- 1 Under the Site Navigation menu, select **Admin Web Accounts**. The Maintain Employer Web Accounts screen opens.
- 2 On the Maintain Employer Web Accounts screen, view all the user accounts in your agency and their statuses. On this screen, you can activate, in-activate, and unlock accounts and reset passwords by clicking “yes” in the appropriate row and column.

MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	yes
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	n/a
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	n/a

How to in-activate an employer reporter account

Any time an employer reporter steps down from the role, you need to in-activate their account so they no longer have EDX access.

Note: A web admin cannot in-activate a former web administrator — only PERS staff can do that. To in-activate a web admin account, contact your ESC representative.

- 1 Log into EDX.
- 2 Choose the **Admin Web Accounts** function. The Maintain Employer Web Accounts screen opens.
- 3 Under the Active User Accounts section, locate the account you want to in-activate. Click the “yes” link under the In-Activate? column corresponding to that account.
- 4 The Status Change Confirmation screen confirms the account status is now inactive.

MAINTAIN EMPLOYER WEB ACCOUNTS

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

ACTIVE USER ACCOUNTS

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	n/a
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	n/a
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]	yes	yes	n/a

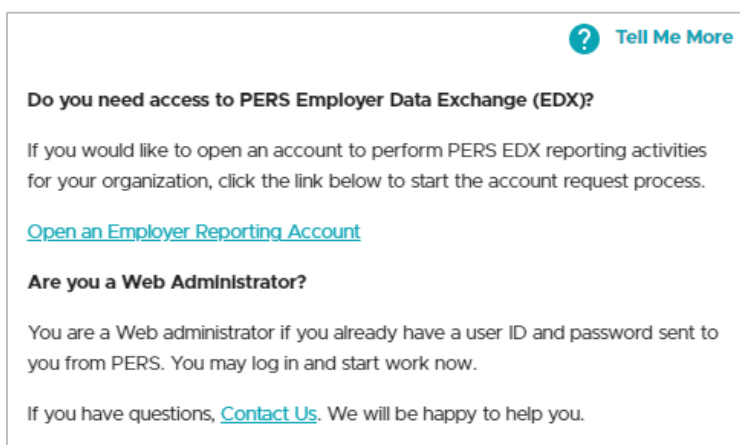
PART 2 – THE EMPLOYER REPORTER

Getting started

Getting an account

A new employer reporter can set up their own account in EDX. It requires approval from the web administrator to get activated.

- 1 Go to the [PERS Log In](#) page. Do not log in.
- 2 Click “Open an Employer Reporting Account.” The Employer Reporting Account Creation screen opens.



- 3 Fill in account information. Click **Next**.
 - User ID:** must not be claimed by anyone else and must be at least six characters long. Most often, it is your last name and first initial (e.g., DoeJ).
 - Password:** must be composed of the following.
 - At least seven characters.
 - Three of these character types:
 - a. An uppercase letter (A–Z).
 - b. A lowercase letter (a–z).
 - c. A numeric character (0–9).
 - d. A special character (e.g., !, #, @, %).
- 4 Review your information. If it’s correct, click **Save Account**. If you need to fix something, click **Cancel** to return to the previous screen.
- 5 Notify your agency’s web administrator that you have submitted a request to open an account.

Once your web administrator activates your account, they will notify you.

If you requested access to multiple employers, each employer’s web administrator must activate your account before you can access their information.

Logging in

Enter your user ID and password and hit Enter or click **Log In**.

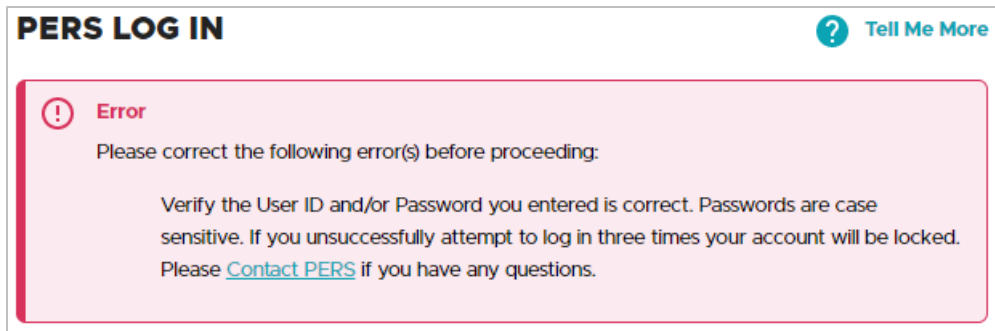


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Troubleshooting your account

Trouble logging in

If you enter the wrong user ID or password, you will receive an error warning. If you enter your information incorrectly three times, EDX will lock your account.



The screenshot shows the "PERS LOG IN" form with an error message displayed in a pink box. The error message reads: "Error Please correct the following error(s) before proceeding: Verify the User ID and/or Password you entered is correct. Passwords are case sensitive. If you unsuccessfully attempt to log in three times your account will be locked. Please [Contact PERS](#) if you have any questions." In the top right corner of the form, there is a "Tell Me More" link with a question mark icon.

If you enter an incorrect password and/or user ID three times, EDX will lock your account and display the message below.

Multiple unsuccessful log in attempts. Your account is now locked.

Unlocking your account

Contact your web administrator and ask them to unlock your account.

Updating your account information

To change your password, update your name or email, or add a new employer number to your list, go to the **Update My Profile** function.

Changing your password

Passwords expire after 90 days, requiring you to create a new one. Fifteen days before your password expires, a warning message (like the one shown below) will start appearing at the top of the Employer Home Page screen to tell you how many days remain before your current password is invalid.

 **Warning**

Your password will expire in 8 days. To update your password: click on the 'Update My Profile' link, enter your password in the password field and the confirm password field, and then click 'OK'

Before your password expires, you can update it by selecting **Update My Profile** from the main Site Navigation and filling in the required information.

- 1 Select Update My Profile to open the Update My Account Profile form.
- 2 Type your new password in the Password text box and also in the Confirm Password text box.

Your new password must be at least seven characters and contain three of these character types:

- a. An uppercase letter (A–Z).
- b. A lowercase letter (a–z).
- c. A numeral (0–9).
- d. A special character (e.g., !, #, @, %).

- 3 Click **NEXT**.

In the Update My Account Profile form (shown on next page), enter your new password and any other required information (fields with an asterisk are required) and click **NEXT**.

Passwords must be a minimum of seven characters and must contain three of the following character types:

- a. An uppercase letter (A–Z).
- b. A lowercase letter (a–z).
- c. A numeral (0–9).
- d. A special character (e.g., !, #, @, %).

Also, the password you type must not contain three or more consecutive characters from your user account.

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 List](#)
- [Request Information](#)
- [Eligibility Reports](#)
- [Status Check](#)
- [Inactive Employment Report](#)
- [View IAP Voluntary Contribution Report](#)

BIG SCHOOL #1
Employer Number:

UPDATE MY ACCOUNT PROFILE

This page will allow you to update your Web account information. You can update your e-mail address, change your password and request additional employers to work with.

* - indicates required fields.

User ID	<input type="text"/>
Password*	<input type="password" value="....."/> Password Requirements
Confirm Password*	<input type="password"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Email*	<input type="text"/>
Confirm Email*	<input type="text"/>
Employer Numbers*	<input type="text" value="e.g., 10000,20000,3000"/>

At least one Employer Number is required.

[NEXT](#)

Changing your email

On the Update My Account Profile screen, enter your new email address, confirm the email address, add any other required information, and click **NEXT**.

Adding an employer number

Each employer is assigned a five-digit employer number that begins with a zero. To add a new employer number to your list, go to **Update My Profile** and add a new employer number at the end of your list of employers in the Employer Numbers box. Enter the new employer number separated by a comma with no space and click **NEXT**.

Before an employer reporter can access the new employer's information, their web administrator for the new account needs to approve the addition. The web admin will not receive a notification, so the reporter may want to notify them of the request.

REPORTER ROLES AND EDX ACCESS

To approve the addition of an employer number, the web administrator for the new account selects **Admin Web Accounts** from the Site Navigation. They then “activate” the change to the account.

UPDATE MY ACCOUNT PROFILE

This page will allow you to update your Web account information. You can update your e-mail address, change your password and request additional employers to work with.

* - indicates required fields.

User ID	<input type="text"/>
Password*	<input type="password"/> Password Requirements
Confirm Password*	<input type="password"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Email*	<input type="text"/>
Confirm Email*	<input type="text"/>
Employer Numbers*	<input type="text" value="04260,02880"/> <small>At least one Employer Number is required.</small>

Changing your expired password

If you do not change your EDX password before it expires, the next time you try to log in, EDX will prompt you to enter a new password.

Reporting to PERS

Employer reporters are the main users of EDX. They use the system at least every payroll cycle to enter employees' wages and hours worked. In between payroll cycles, they use EDX to report a new employee, change an employee's job status, run reports, and fulfill information requests from PERS.

The PERS system is complicated and, therefore, EDX is complicated, too. It is picky about the information you enter and how you enter it because incorrect information has important consequences, such as:

- Reports that won't post (i.e., reports that contain errors are flagged with an error code, which keeps them from being submitted to PERS (called "suspended")).
- Inaccurate member accounts.
- Financial costs (e.g., late fees, prior-year earnings).
- A long retirement process caused by PERS staff manually correcting errors.

Learning how to report

Reporting to PERS is a complex process. A reporter needs to understand the EDX system and the PERS rules, which have many exceptions. To help reporters learn, the Employer Service Center offers a range of training and educational materials.

Reporting employee hours, wages, and contributions

Employer reporting guides

[4, *Creating a Report.*](#)

[5, *Creating a Record.*](#)

[9, *Reporting Wages for a Qualifying Employee.*](#)

Quick-reference guide

["Choosing the Best Record and Report Types."](#)

Training manuals

[Beginner Employer Reporting training manual 1](#)

[Beginner Employer Reporting training manual 2](#)

Reporting demographic information and status changes

Employer reporting guides

[7, *Reporting a New Employee.*](#)

[11, *Reporting a Leave.*](#)

[15, *Reporting a Termination or Death.*](#)

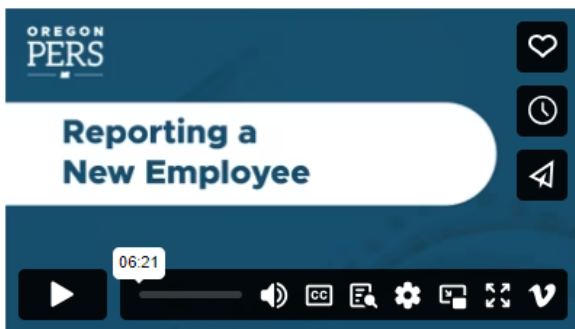
[22, *Changing Employee Demographic Information.*](#)

Videos

“Reporting a New Employee” video.

“The Role of the Web Administrator” video.

“The Role of the Employer Reporter” video.



Running reports

Employer reporting guide [24, Running Reports](#).

Correcting suspended records

Employer reporting guide [6, Correcting Suspended Records](#).

Getting reporting help

Your [ESC representative](#) is there to answer questions, help solve problems, and support you in the very important, and complex, process of PERS reporting.

If you don't know who your PERS employer representative is, please email PERS.EDX.Support@pers.oregon.gov to ask who your rep is.