

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Employer Advisory Group

July 15, 2022



Agenda

- Director's Office Update
- Senate Bill 1049 Update
- Communications Update
- Actuarial Update
- Additional Items
 - Employer Training and Workday Learning
 - EDX User Interface Upgrade

Director's Office Update

May 27 board meeting

- First hybrid meeting.

2023-25 budget planning

Modernization update

Legislative update

Director's Office Update

Questions or comments?

SB 1049 Update







Remaining projects

- Member Redirect.
 - Work Package (WP) 6.1, EPSA Retirement, deploys 7/21/22.
- Technical Debt.
 - WP 1, Employer Statements, deploys 7/21/22.

2023-25 budget planning

Senate Bill (SB) 1049 Implementation Road Map







2019-2021 Biennium

| | 2019 | | | | | | 2020 | | | | | | 2021 | | | | | | | | | | | |
|--|--|-----|-----|-----|-----|-----|---|-----|-----|-----|-----|-----|--|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN |
|  Employer Programs | 7/1/19 – Effective Date | | | | | | | | | | | | 8/6/20 – Employer Rate Projection Tool (ERPT) Assessment Complete | | | | | | | | | | | |
| | 9/3/19 – Employer Incentive Fund (EIF) Application #1 Opens | | | | | | | | | | | | 12/1/20 – EIF Application #2 Closes | | | | | | | | | | | |
| | | | | | | | 11/27/19 – EIF Application #1 Closes | | | | | | 3/30/21 – Work Package (WP) 1 Migrate and Adapt ERPT → | | | | | | | | | | | |
| | | | | | | | 12/2/19 – EIF Application #2 Opens | | | | | | 6/30/21 – WP2 ERPT Stakeholder Acceptance and Deployment → | | | | | | | | | | | |
|  Salary Limit | | | | | | | 12/24/19 – Work Package (WP) 1 – Short Term | | | | | | 11/19/20 – WP3 User Screens to Record Annual Salary Limit – Long Term | | | | | | | | | | | |
| | | | | | | | 1/1/20 – Effective Date | | | | | | 5/13/21 – WP4 Proration Reports and Workflow – Long Term → | | | | | | | | | | | |
| | | | | | | | 1/24/20 – WP2 Post 2020 Salary Limit – Long Term | | | | | | 5/28/21 – Project Close → | | | | | | | | | | | |
|  Work After Retirement | | | | | | | 12/19/19 – Work Package (WP) 1 Retiree Wages Suspended – Short Term | | | | | | 11/19/20 – WP2 New Wage Codes with General Ledger (GL) Integration – Long Term | | | | | | | | | | | |
| | | | | | | | 1/1/20 – Effective Date | | | | | | 5/13/21 – WP3 Retro Rate Change – Long Term → | | | | | | | | | | | |
|  Member Redirect | | | | | | | 6/18/20 – Work Package (WP) 1 Employee Pension Stability Account Set Up/Batch/General Ledger – Short Term | | | | | | 9/22/20 – Voluntary Contributions Initial Functionality – Long Term | | | | | | | | | | | |
| | | | | | | | 7/1/20 – Effective Date | | | | | | 10/30/20 – WP2.2 IAP Forecaster Tool – non-jClarety – Long Term | | | | | | | | | | | |
| | | | | | | | 1/21/21 – WP5.2 Online Member Services User Interface – Long Term → | | | | | | 11/19/20 – Voluntary Contributions Final Functionality Release – Long Term | | | | | | | | | | | |
| | | | | | | | 1/26/21 – WP2 TIED SSIS – Non-jClarety – Long Term → | | | | | | 3/23/21 – WP3 EPSA Earnings – Long Term | | | | | | | | | | | |
| | | | | | | | 6/24/21 – WP4.2 EPSA Display, and WP12 Full EPSA Set up Screen – Long Term → | | | | | | | | | | | | | | | | | |
|  Member Choice | 10/23/19 – Project Kick Off | | | | | | 8/19/20 – Member Choice Notification | | | | | | 8/20/20 – Work Package (WP) 1 Online Member Services (OMS) Changes Deployed | | | | | | | | | | | |
| | 5/15/20 – Member Annual Statements (MAS) Flyer Communication | | | | | | | | | | | | 9/1-30/20 – Election Period | | | | | | | | | | | |
| | | | | | | | | | | | | | 1/1/21 – Effective Date | | | | | | | | | | | |
| | | | | | | | | | | | | | 3/23/21 – WP2 OMS & jClarety Enhancements – Long Term → | | | | | | | | | | | |
| | | | | | | | | | | | | | 5/1/21 – Member Choice reflected in MAS → | | | | | | | | | | | |
| | | | | | | | | | | | | | 6/24/21 – WP3 Online Member Services (OMS) Election and Bugs → | | | | | | | | | | | |
| PROGRAM INITIATIVE | | | | | | | | | | | | | | | | | | | | | | | | |
|  Cross Project Effort | | | | | | | | | | | | | | | | | | | | | | | | |
| | 1/26/21 – WP2.1 IAP Payment Recon (short-term) → | | | | | | | | | | | | | | | | | | | | | | | |
| | 3/18/21 – WP1.2 IAP Validator Tool (long-term) → | | | | | | | | | | | | | | | | | | | | | | | |
| | 9/17/20 – WP1.1 IAP Validator Tool (short-term) → | | | | | | | | | | | | | | | | | | | | | | | |
| | 4/27/21 – WP2.2 IAP Payment Recon (long-term) → | | | | | | | | | | | | | | | | | | | | | | | |
| | 5/13/21 – WP7.2 Employer Information Actuarial Extract → | | | | | | | | | | | | | | | | | | | | | | | |
| | 6/18/21 – WP5.1 PYE Invoicing Tool → | | | | | | | | | | | | | | | | | | | | | | | |
| | 6/24/21 – WP7.1 Non-Retired Census Actuarial Extract → | | | | | | | | | | | | | | | | | | | | | | | |
| | 6/28/21 – WP4.1 IAP Adjustment Calculator → | | | | | | | | | | | | | | | | | | | | | | | |



Revised: June 16, 2021

Senate Bill (SB) 1049 Implementation Road Map

2021-2023 Biennium

| | 2021 | | | | | | 2022 | | | | | | | | | | | | 2023 | | | | | |
|---|---|-----|-----|-----|-----|-----|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|-----|-----|-----|-----|-----|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN |
|  Employer Programs | • 7/16/21 – Project Close | | | | | | | | | | | | | | | | | | Jun 17 | | | | | |
|  Work After Retirement | | | | | | | • 12/16/21 – WP4 Side Account Credit Allocation | | | | | | | | | | | | | | | | | |
| | | | | | | | • 2/24/22 – Project Close | | | | | | | | | | | | | | | | | |
|  Member Redirect | | | | | | | • 10/14/21 – WP5 Voluntary Contribution Maintenance – Long Term | | | | | | | | | | | | | | | | | |
| | | | | | | | • 3/24/22 – WP4.3 EPSA Transaction Display – Long Term | | | | | | | | | | | | • 7/21/22 – WP6.1 EPSA Retirement – Long Term | | | | | |
| | | | | | | | | | | | | | | | | | | | • 2/23/23 – WP9.1 EPSA Withdrawal – Long Term → • | | | | | |
| | | | | | | | | | | | | | | | | | | | • 2/23/23 – WP9.2 Alter OPSRP Withdrawal – Long Term → • | | | | | |
|  Member Choice | • 8/4/21 – Project Close | | | | | | | | | | | | | | | | | | | | | | | |
|  Technical Debt | • 7/1/21 – Project Kickoff | | | | | | | | | | | | | | | | | | | | | | | |
| | 4/30/22 – WP3 General Ledger Reversals, Including Side Accounts – Functional Design Specification Completed | | | | | | • 3/31/22 – WP2 Benefit Account Transition Status – Functional Design Specification Completed | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | • 7/21/22 – WP1 Employer Statements | | | | | |
| | | | | | | | | | | | | | | | | | | | • 9/15/22 – WP4 Hyperion Replacement | | | | | |
| PROGRAM INITIATIVE | | | | | | | | | | | | | | | | | | | | | | | | |
|  Cross Project Effort | | | | | | | • 3/4/22 – WP3 IAP Divorce Tool | | | | | | | | | | | | | | | | | |
| | | | | | | | • 5/20/22 – WP5.2 PYE Invoicing Tool | | | | | | | | | | | | | | | | | |
| | | | | | | | • 6/1/22 – WP4.2 IAP Adjustment Calculator | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | TBD – WP6 IAP Balance Comparison Tool | | | | | |

2023-2025 Biennium

| PROJECTS | 2023 | | | | | | 2024 | | | | | | | | | | | | 2025 | | | | | |
|--|---|-----|-----|-----|-----|-----|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN |
|  Member Redirect | • 7/20/23 – WP8.1 EPSA Pre-Retirement Death – Long Term | | | | | | • 3/28/24 – Migration Finalization | | | | | | | | | | | | | | | | | |
| | • 7/20/23 – WP10 Backlog Implementation – Long Term | | | | | | • 4/25/24 – Project Close | | | | | | | | | | | | | | | | | |
| | | | | | | | • 12/21/23 – WP11.1 Reemployment – Long Term | | | | | | | | | | | | | | | | | |
| | | | | | | | • 12/21/23 – WP11.2 Excess EPSA – Long Term | | | | | | | | | | | | | | | | | |
| | | | | | | | • 3/28/24 – WP12.2 Final Backlog Implementation – Long Term | | | | | | | | | | | | | | | | | |
| PROGRAM INITIATIVE | | | | | | | | | | | | | | | | | | | | | | | | |
|  Cross Project Effort | | | | | | | • 3/28/24 – WP7.3 Tier One/Tier Two/OPSRP Payouts Actuarial Extract | | | | | | | | | | | | | | | | | |

Revised: June 16, 2022

SB 1049 Update

Technical Debt Project

Work Package 1 – Employer Statements

Deploys to production environment on July 21.

- New and historical statements follow same new layout.
- Employer testing:
 - 10 employers completed testing.
 - First time PERS used our testing application, QMetry, outside the agency.
 - Testers viewed two statement periods.
 - Survey had more than 50% participation (at the time these slides were created).
 - Captured statement-functionality suggestions for future updates.

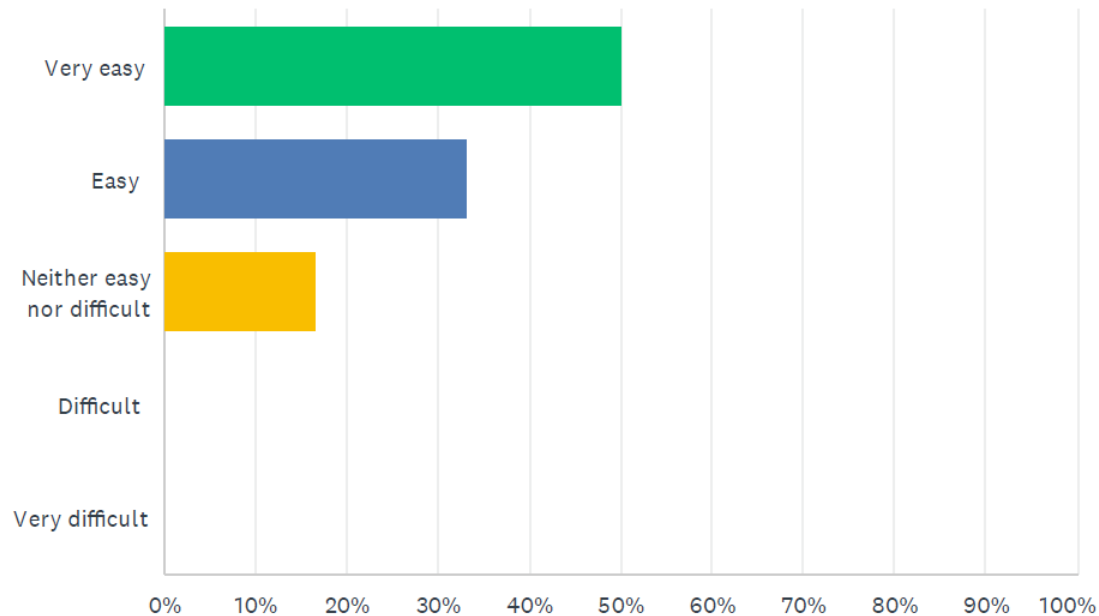
SB 1049 Update

Technical Debt Project

Employer Statements Survey Results

Q1 How easy was it to use the new Employer Statement functionality?

Answered: 6 Skipped: 0



SB 1049 Update

Technical Debt Project

Q2 What are your first impressions of the new Employer Statement layout?

Answered: 6 Skipped: 0

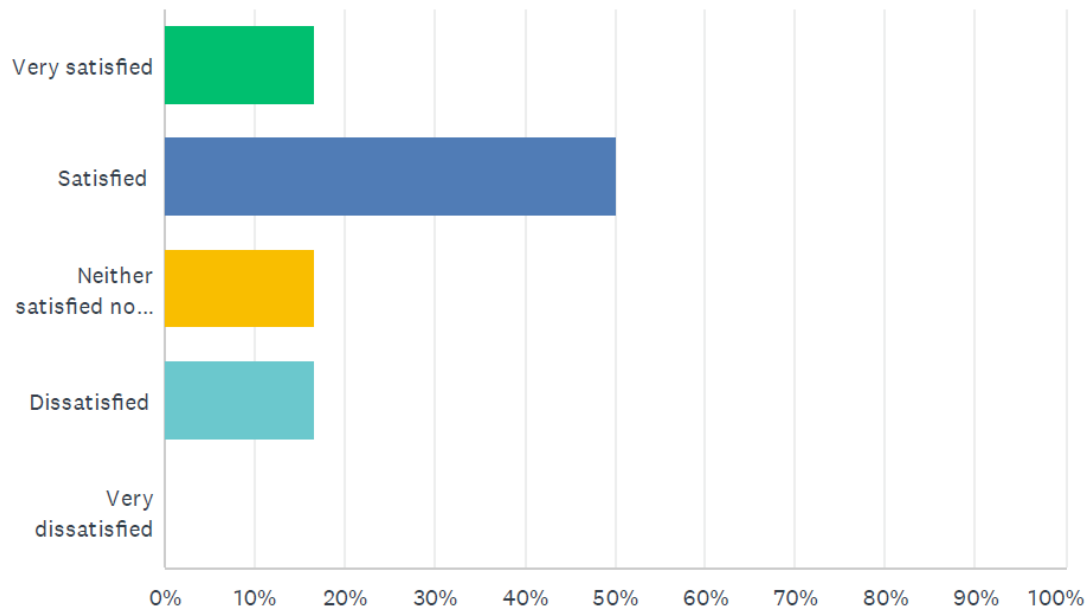
| # | RESPONSES |
|---|--|
| 1 | more user friendly |
| 2 | Very similar to the old way but with more detail which is nice |
| 3 | it is much more visually pleasing and has more detailed descriptions |
| 4 | Very clean and easy to understand |
| 5 | Very busy and not very printer friendly - Prints on 3 pages. Hopefully it will look better when there is not all the test extra information. |
| 6 | More complicated than current |

SB 1049 Update

Technical Debt Project

Q3 How satisfied are you with the look and feel of the Employer Statement layout?

Answered: 6 Skipped: 0

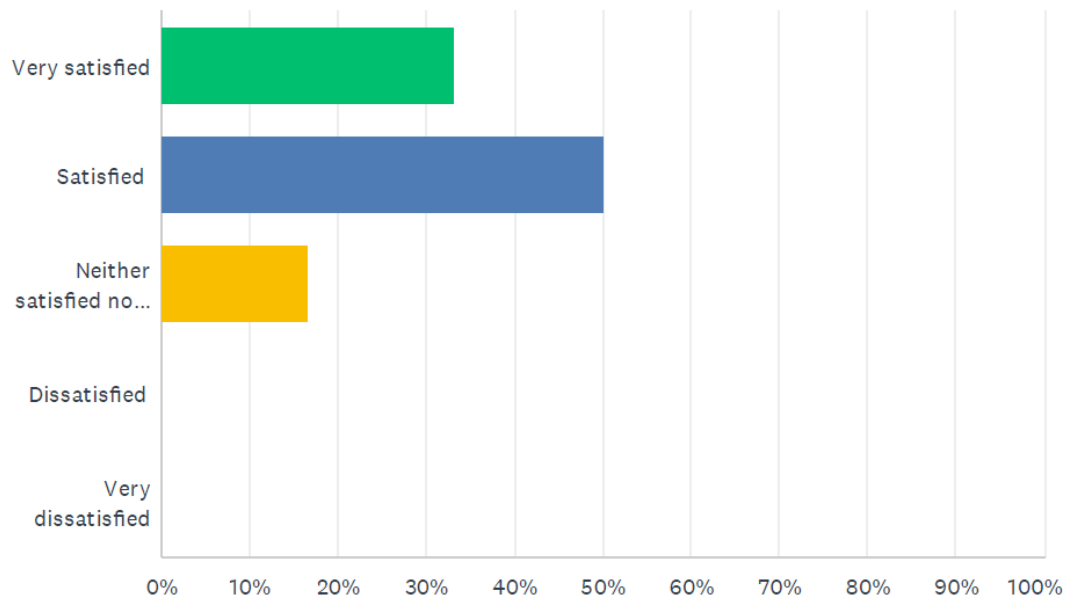


SB 1049 Update

Technical Debt Project

Q4 How satisfied are you with the navigation of the Employer Statement?

Answered: 6 Skipped: 0



SB 1049 Update

Technical Debt Project

Q5 Do you have concerns with the Employer Statement functionality or layout? If "yes" please explain.

Answered: 5 Skipped: 1

| # | RESPONSES |
|---|--|
| 1 | Yes It appears that UAL and Side accounts is now combined with the Pension invoices. It would be much more user friendly if it was segmented out on its own. With working with an agency with dozens of invoices, this will only add to that list unnecessarily. |
| 2 | Only concern is the comment on the statement about negative current activity means no invoice until next time. Even if you have negative activity in the current period, wouldn't you still need to pay if the total due is positive? |
| 3 | Not yet. The true test will come when I balance the first month's statement utilizing the new format. |
| 4 | Yes - the layout is not printer friendly. Having the UAL credits and UAL Contributions on two separate invoices creates added paper to print and reconcile. |
| 5 | Yes, not able to export to CSV or Excel |

Note about #2: The comment in EDX was worded incorrectly and we are fixing it. Release date pending.

SB 1049 Update

Technical Debt Project

Q6 Do you have any questions about the Employer Statements which were not answered during the testing period? If "yes" please explain.

Answered: 5 Skipped: 1

| # | RESPONSES |
|---|---|
| 1 | no |
| 2 | Only concern is the comment on the statement about negative current activity means no invoice until next time. Even if you have negative activity in the current period, wouldn't you still need to pay if the total due is positive? |
| 3 | No |
| 4 | No testing was very straight forward and very easy to follow. |
| 5 | no |

SB 1049 Update

Technical Debt Project

Q7 What do you like most about the new Employer Statement functionality?

Answered: 6 Skipped: 0

| # | RESPONSES |
|---|---|
| 1 | the "this statement at a glance" section |
| 2 | Copy and paste to Excel works and is useable. That is INCREDIBLY helpful!! |
| 3 | Easy to read, more descriptions |
| 4 | I like the summary at the top. I could locate the balances easily before diving into the rest of the statement. |
| 5 | The summary at the top of the page with the total owed. |
| 6 | more detail available |

SB 1049 Update

Technical Debt Project

Q8 What do you like the least about the new Employer Statement functionality?

Answered: 5 Skipped: 1

| # | RESPONSES |
|---|---|
| 1 | The invoices are no longer summarized at the bottom. They are now listed multiple times throughout the statement. This may lead to opening an invoice more than once in error. |
| 2 | Wish there was a direct export to Excel. |
| 3 | Some items still don't have a hyperlink. |
| 4 | Too busy, hopefully with normal payroll it will be easier to read. I miss having the list of the invoices with the hypelinks at the bottom of the page. Having the same hyperlinks repeated 3 times is confusing. I will be having to double check to review each invoice to make sure I have everything. |
| 5 | not able to export |

SB 1049 Update

Technical Debt Project

Q9 What is the most important feature you feel should be added to the Employer Statements?

Answered: 5 Skipped: 1

| # | RESPONSES |
|---|--|
| 1 | The separation of UAL and Side Accounts from invoices. |
| 2 | Export to Excel functionality for all areas. |
| 3 | The summary at the top. |
| 4 | Printer friendly layout, and layout that defaults to portrait. Also some type of csv layout so we can export the information to excel. The information copies to excel but with all the different subsections it is not very user friendly for analysis. |
| 5 | ability to export to csv or excel |

SB 1049 Update

Technical Debt Project

Questions or comments?

Communications

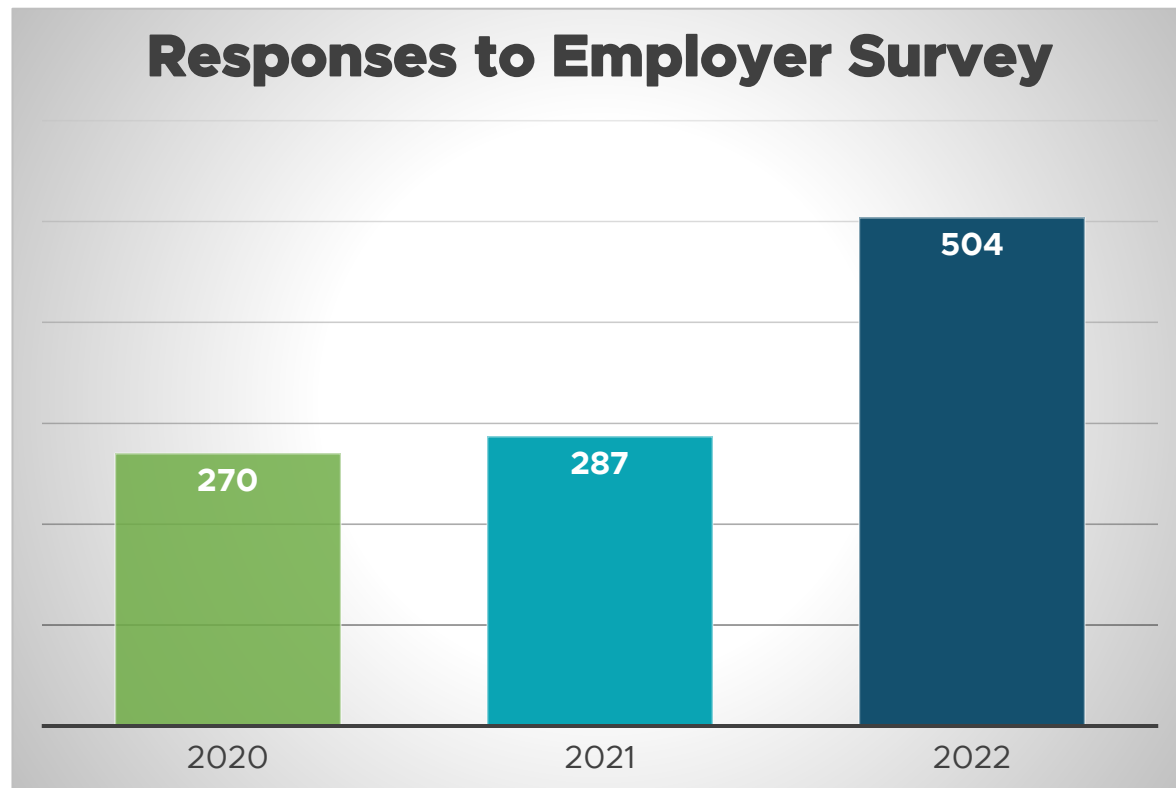
- Employer Satisfaction Survey results.
- New employer statements communications plan.
- New employer online materials.

Communications

Employer Satisfaction Survey

Open May 1 – 31

76% more responses



Communications

New Employer Statements

Communications plan

Inform

July 11 *Employer News* article

July 21 *NewsBite* email

July 21 Website
announcement

Educate

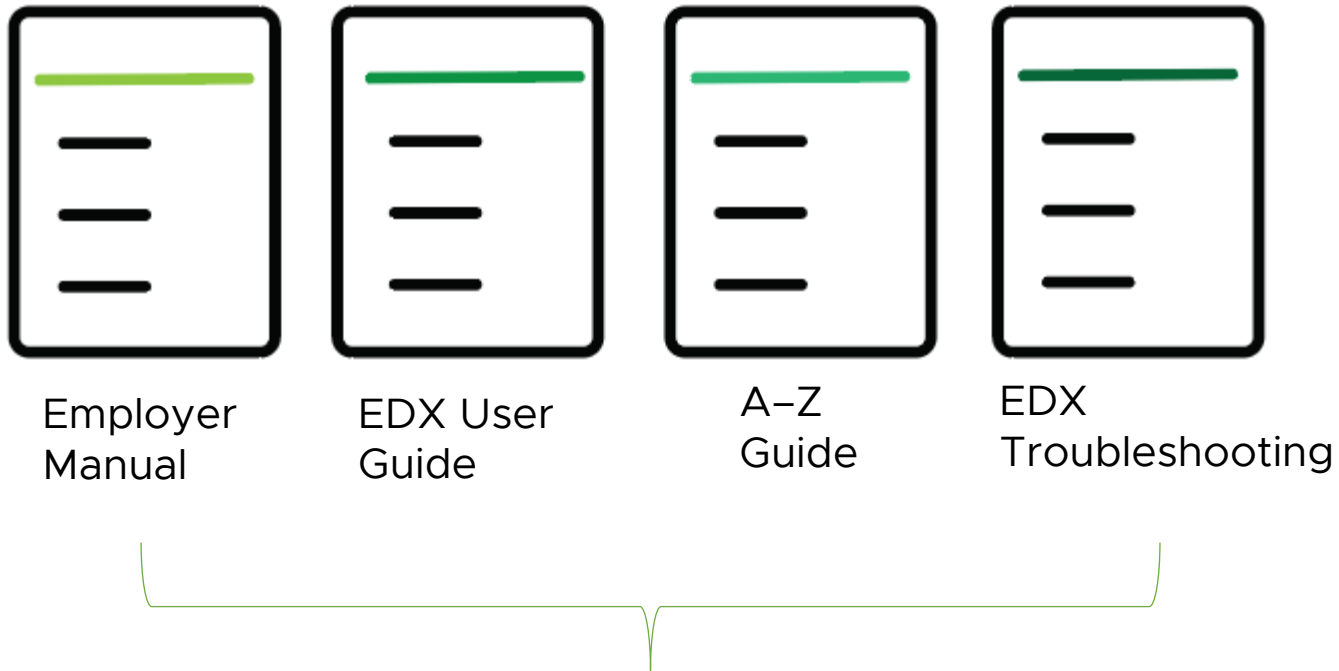
July 6 Understanding Your
Statement webpage,
including instructions
and video

July 29 OASBO conference

Communications

Employer online materials

Combining and updating current guides



Communications

Employer online materials

Creating individual instructions

PERS
Overview

Running
Reports

Paying
Your
Invoice

Changing
Demo-
graphic
Info

Reporting
Time
Away
From
Work

Reporting
a
Retirement

Reporting
a New
Employee

Correcting
Suspended
Records

Quick
References

Glossary

Communications

Questions or comments?

Actuarial Update

Important Dates

- July 22 PERS Board meeting.
 - System-wide rate-setting actuarial valuation results.
- September 30 PERS Board meeting.
 - Individual employer results.
- October.
 - Individual employer valuations available online.

Actuarial Update

Valuation Format Review

- Feedback from the two focus groups was consistent.
- Groups had great ideas that we are implementing:
 - Excel documents posted to Actuarial Documents website.
 - Explanation of Multnomah Fire District #10 UAL rate in the July employer newsletter.
- Live EAG group poll to determine priority.
- Additional discussion.

Actuarial Update

In-Depth Questions

What is the best way to address them?

Additional Items

- Employer Training and Workday Learning
- EDX User Interface Upgrade

Sarah Diggs

Elli Probasco

Employer Training and Workday Learning



Search


- Learning
- Learning Home
- My Learning
- Discover
- Links
 - LRN | Learning Certificates ...
 - LRN | My Learning and Trai...
 - Add Training

What will you learn today?



 **Browse Learning**
Find the training you need to take.
[Browse Learning Content](#) →


Continue Learning [View More](#)



Basic EDX Concepts

0 of 1 mandatory lessons completed


[Go to Lesson 1](#) →



Advanced EDX

0 of 4 mandatory items completed


[Go to Item 1](#) →



New Employer Statements

0 of 1 mandatory lessons completed

[Go to Lesson 1](#) →



Understanding UAL

0 of 1 mandatory lessons completed

[Go to Lesson 1](#) →

EDX Interface Upgrade

- To allow EDX to be used in Chrome and Firefox browsers in addition to Edge.
 - Requires EDX to be updated to work with modern browsers, which makes labels and text boxes look different.
 - Look updated with PERS branding.
- Planned for release November 17, 2022.
 - Asking employer volunteers to help test beginning in early October.
 - Process will be like employer-statement testing in June.

EDX Interface Upgrade

Example of changes

Working with : MUMFORD COUNTRY, 01234

Employer Home Page

This is your employer home page. If you are responsible for one employer, you can choose another employer by clicking on the icon marked with is your default employer and you can work for multiple employers.

- [Choose Your Employer](#)
- [View Employer Information](#)
- [View Your Contacts](#)
- [Tell Me More](#)

Messages From PERS
You have no messages.

Employer Information

| | |
|-----------------------|---------------------------------------|
| Employer Name : | MUMFORD COUNTRY |
| Employer Number : | 01234 |
| Address : | 5302 E MAIN ST HILLSBORO, OR 97123 |
| Reporting Frequency : | Monthly |
| Phone : | |
| Status : | Active |
| Status Date : | 07/01/1946 |

MC MUMFORD COUNTY
Employer Number: 01234

Show less Set as Default Switch Emp

| | | | |
|---------|---------------------------------------|---------------------|------------|
| Address | 5302 E Main St Hillsboro, OR 97123 | Status | Active |
| Phone | | Status Date | 07/01/1946 |
| | | Reporting Frequency | Monthly |

EMPLOYER HOME PAGE

ALERTS FROM PERS
You have no alerts.

YOUR CONTACTS

| Contact Type | Contact Name | Contact Phone |
|----------------------|------------------|---------------|
| Employer Reporting 1 | CHRISTINAHampton | n/a |

EDX Interface Upgrade

Example of changes

Employee Employment History Details

This page displays the employee's employment history with this employer, starting with the most recent employ

- [View Address Details for this employee.](#)
- [View Salary Details for this employee.](#)
- [Work with Demographic Correction Request \(DCR\).](#)
- [Create Salary Breakdown Request.](#)

Employment Details For: ANNA SMITH , SSN:123456789, PERS ID: 514257
Date of Birth: 01/01/1970
Contribution Start Date: 03/01/1997
IAP Voluntary Contribution Effective Date: None
IAP Voluntary Contribution Stop Date: None

| Hire Intent | Start Date | Last Day Service | Term / End Date | Gross Unused Sick Leave | Transferred Unused Sick Leave | Job Class | Position Type | Plan |
|-------------|------------|------------------|-----------------|-------------------------|-------------------------------|-----------------|----------------|-------------|
| Q | 08/28/1991 | 06/14/1996 | 06/14/1996 | 0.000 | | School Employee | Active Service | PERS Tier 1 |

VIEW EMPLOYEE INFORMATION

This page displays the employee's employment history with this employer, starting with the most recent employment.

[Return to Employee Info search results page](#)

AS ANNA SMITH
PERS ID: 514257

SSN: 123456789 Contribution Start Date: 03/01/1997
 Date of Birth: 01/01/1970 IAP Voluntary Contribution Effective Date: None
 IAP Voluntary Contribution Stop Date: None

Employment History Address Details Salary Details Demographic Correction Request (DCR) Salary Breakdown Request

EMPLOYMENT HISTORY

| Hire Intent | Start Date | Last Day Service | Term/End Date | Gross Unused Sick Leave | Transferred Unused Sick Leave | Job Class | Position Type | Plan |
|-------------|------------|------------------|---------------|-------------------------|-------------------------------|-----------------|----------------|-------------|
| Q | 08/28/1991 | 06/14/1996 | 06/14/1996 | 0.000 | | School Employee | Active Service | PERS Tier 1 |

Verify All Save Cancel

EDX Interface Upgrade

Questions or comments?

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



THANK YOU

