

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Employer Advisory Group

July 21, 2023



Agenda

- Director's Office update
- Actuarial update
- Senate Bill 1049 program update
- Employer Service Center update
- Legislative update
- Communications update
- Open discussion

Director's Office update

Kevin Olineck, PERS' Director

Director's Office update

- July 28 PERS Board meeting.
- 2023-25 budget.



Senate Bill 1049 program update

Yvette Elledge-Rhodes, Deputy Director
Elli Probasco, Product Owner
Christina Hampton, Associate Product Owner

SB 1049 program update

Member Redirect project

- June 29 deployment – work packages 9.1 and 9.2.
 - Updates to Employee Pension Stability Accounts (EPSA) that allow us to process, distribute, and make general ledger transactions of EPSA withdrawals.
- Six remaining work packages.

Technical Debt project

- June 29 deployment – work package 6 (General Ledger Reversals).
- One remaining work package.

Three planned deployments

Definitions

EPSA

Employee Pension Stability Account. The Member Redirect program redirects a portion of an employee's 6% IAP contribution into their EPSA, which will be used to help pay for their future retirement.

Tier One/Tier Two: 2.5%

OPSRP: 0.75%

General ledger







A means for keeping records of a company's total financial accounts. Accounts typically recorded in a GL include assets, liabilities, equity, expenses, and income or revenue.

Work package

A subproject of the SB 1049 project. These WPs are updates to PERS system software.




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
 Employer Programs	● 7/16/21 – Project Close												Jun 23										
 Work After Retirement							● 12/16/21 – WP4 Side Account Credit Allocation																
							● 2/24/22 – Project Close																
 Member Redirect							● 10/14/21 – WPS Voluntary Contribution Maintenance						● 7/21/22 – WP6.1 EPSA Retirement										
							● 3/24/22 – WP4.3 EPSA Transaction Display						6/29/23 – WP9.1 EPSA Withdrawal										
													6/29/23 – WP9.2 Alter OPSRP Withdrawal										
 Member Choice	● 8/4/21 – Project Close																						
 Technical Debt	● 7/1/21 – Project Kickoff						● 3/31/22 – WP2 Benefit Account Transition Status – Functional Design Specification Completed						6/29/23 – WP6 General Ledger Reversals										
	4/30/22 – WP3 General Ledger Reversals, Including Side Accounts – Functional Design Specification Completed						● 7/21/22 – WP1 Employer Statements						● 10/20/22 – WP4 Hyperion Replacement										
PROGRAM INITIATIVE							● 3/4/22 – WP3 IAP Divorce Tool																
 Cross Project Effort							● 5/20/22 – WP5.2 PYE Invoicing Tool																
							● 6/1/22 – WP4.2 IAP Adjustment Calculator																

Senate Bill (SB) 1049 Implementation Road Map

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																									
 Technical Debt																									
PROGRAM INITIATIVE  Cross Project Effort																									

SB 1049 program update

Employer statement download

Employer statement download functionality

- Will allow employers to download invoice details from employer statements into an .xlsx file.
- Internal testing begins October 20, 2023.
- Deployment to Production is currently projected for evening of February 15, 2024.

If anyone from EAG is interested in trying out the functionality during testing, please let me know! Email Product.Owner.Team@pers.oregon.gov

SB 1049 program update

Employer statement download

View employers will have on their Invoice Summary screen.

WAGE AND CONTRIBUTION INVOICE SUMMARY ? Tell Me More

INVOICE SUMMARY

Employer 00111
 Date Posted 04/24/2023
 Invoice Number 9988776
 Invoice Description Contributions Pension
 Invoice Amount (\$746.71)

[Download Full Invoice Detail](#)

IAP

Type	Pay Date	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP	Unit	Employer	Total
IAP	06/30/2007	(\$652.00)	\$0.00	(\$39.12)	\$0.00	\$0.00	\$0.00	\$0.00	(\$39.12)
	07/31/2007	(\$240.00)	\$0.00	(\$14.40)	\$0.00	\$0.00	\$0.00	\$0.00	(\$14.40)
	03/31/2008	(\$1,212.22)	\$0.00	\$0.00	(\$72.73)	\$0.00	\$0.00	\$0.00	(\$72.73)
	04/30/2008	(\$1,328.70)	\$0.00	\$0.00	(\$79.72)	\$0.00	\$0.00	\$0.00	(\$79.72)
	05/31/2008	(\$1,199.62)	\$0.00	\$0.00	(\$71.98)	\$0.00	\$0.00	\$0.00	(\$71.98)
	06/30/2008	(\$1,562.25)	\$0.00	\$0.00	(\$93.74)	\$0.00	\$0.00	\$0.00	(\$93.74)
IAP Totals		(\$6,194.79)	\$0.00	(\$53.52)	(\$318.17)	\$0.00	\$0.00	\$0.00	(\$371.69)

OPSRP

Type	Pay Date	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP	Unit	Employer	Total
OPSRP	06/30/2007	(\$652.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$52.42)	(\$52.42)
	07/31/2007	(\$240.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$13.97)	(\$13.97)
	03/31/2008	(\$1,212.22)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$70.55)	(\$70.55)
	04/30/2008	(\$1,328.70)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$77.33)	(\$77.33)
	05/31/2008	(\$1,199.62)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$69.82)	(\$69.82)
	06/30/2008	(\$1,562.25)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$90.93)	(\$90.93)
OPSRP Totals		(\$6,194.79)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$375.02)	(\$375.02)

PERS
No PERS data found for the selected invoice

RHIA
No RHIA data found for the selected invoice

Click Download Full Invoice Detail button, and all invoice data will download into an .xlsx file. There is a tab for each fund type with full employee detail.

SB 1049 program update

Employer statement download

File name includes invoice type code, employer #, invoice #, and date invoice posted.

<<InvTypeCd>>_<<ER#>>_<<Invoice#>>_<<DatePosted>>.xlsx

CONT_00111_9988776_04242023.xlsx

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ER#: 00111	Inv#: 9988776	Type: IAP	Date Posted: 04/24/2023	Inv Amt: (\$746.71)	SL3							
2	Last Name	SSN	Pay Date	Wage Type	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP	Unit	Employer	ER Rate	Total Contributions
3	MARE	22222222	03/31/2008	Negative Adjustment	(\$1,212.22)	\$0.00	\$0.00	(\$72.73)	\$0.00	\$0.00	\$0.00	0.00%	(\$72.73)
4	MARE	22222222	04/30/2008	Negative Adjustment	(\$1,328.70)	\$0.00	\$0.00	(\$79.72)	\$0.00	\$0.00	\$0.00	0.00%	(\$79.72)
5	MARE	22222222	05/31/2008	Negative Adjustment	(\$1,199.62)	\$0.00	\$0.00	(\$71.98)	\$0.00	\$0.00	\$0.00	0.00%	(\$71.98)
6	MARE	22222222	06/30/2008	Negative Adjustment	(\$1,562.25)	\$0.00	\$0.00	(\$93.74)	\$0.00	\$0.00	\$0.00	0.00%	(\$93.74)
7	Ochs	02222221	06/30/2007	Negative Adjustment	(\$652.00)	\$0.00	(\$39.12)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$39.12)
8	Ochs	02222221	07/31/2007	Negative Adjustment	(\$240.00)	\$0.00	(\$14.40)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$14.40)

IAP OPSRP PERS RHIA

SB 1049 program update

Employer statement download

When using Download Invoice Detail button from Invoice Detail screen, only data for selected type will be downloaded into .xlsx file with full member detail.

WAGE AND CONTRIBUTION INVOICE DETAIL

? Tell Me More

INVOICE SUMMARY

Employer 00111
Date Posted 04/24/2023
Invoice Number 9988776
Invoice Description Contributions Pension
Invoice Amount (\$746.71)

Download Invoice Detail

IAP

<u>Last Name</u>	<u>SSN</u>	<u>Pay Date</u>	<u>Wage Type</u>	<u>Subject Salary</u>	MPAT	MPPT	EPPT	ER IAP	Unit	Employer	ER Rate	Total Contributions
MARE	222222222	03/31/2008	Negative Adjustment	(\$1,212.22)	\$0.00	\$0.00	(\$72.73)	\$0.00	\$0.00	\$0.00	0.00%	(\$72.73)
MARE	222222222	04/30/2008	Negative Adjustment	(\$1,328.70)	\$0.00	\$0.00	(\$79.72)	\$0.00	\$0.00	\$0.00	0.00%	(\$79.72)
MARE	222222222	05/31/2008	Negative Adjustment	(\$1,199.62)	\$0.00	\$0.00	(\$71.98)	\$0.00	\$0.00	\$0.00	0.00%	(\$71.98)
MARE	222222222	06/30/2008	Negative Adjustment	(\$1,562.25)	\$0.00	\$0.00	(\$93.74)	\$0.00	\$0.00	\$0.00	0.00%	(\$93.74)
Ochs	022222221	06/30/2007	Negative Adjustment	(\$652.00)	\$0.00	(\$39.12)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$39.12)
Ochs	022222221	07/31/2007	Negative Adjustment	(\$240.00)	\$0.00	(\$14.40)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$14.40)

SB 1049 program update

Employer statement download

File name includes invoice type code, employer #, invoice #, type, and date invoice posted.

<<InvTypeCd>_<ER#>>_<<Invoice#>>_<<Type>>_<<DatePosted>>.xlsx

CONT_00111_9988776_IAP_04242023.xlsx

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ER#: 00111	Inv#: 9988776	Type: IAP	Date Posted: 04/24/2023	Inv Amt: (\$746.71)	SL3							
2	Last Name	SSN	Pay Date	Wage Type	Subject Salary	MPAT	MPPT	EPPT	Opt ER IAP	Unit	Employer	ER Rate	Total Contributions
3	MARE	22222222	03/31/2008	Negative Adjustment	(\$1,212.22)	\$0.00	\$0.00	(\$72.73)	\$0.00	\$0.00	\$0.00	0.00%	(\$72.73)
4	MARE	22222222	04/30/2008	Negative Adjustment	(\$1,328.70)	\$0.00	\$0.00	(\$79.72)	\$0.00	\$0.00	\$0.00	0.00%	(\$79.72)
5	MARE	22222222	05/31/2008	Negative Adjustment	(\$1,199.62)	\$0.00	\$0.00	(\$71.98)	\$0.00	\$0.00	\$0.00	0.00%	(\$71.98)
6	MARE	22222222	06/30/2008	Negative Adjustment	(\$1,562.25)	\$0.00	\$0.00	(\$93.74)	\$0.00	\$0.00	\$0.00	0.00%	(\$93.74)
7	Ochs	02222221	06/30/2007	Negative Adjustment	(\$652.00)	\$0.00	(\$39.12)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$39.12)
8	Ochs	02222221	07/31/2007	Negative Adjustment	(\$240.00)	\$0.00	(\$14.40)	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	(\$14.40)

IAP

Legislative update

Heather Case, PERS' Senior Policy Advisor

Legislative update

2023 Legislative Session ended June 25, 2023.

PERS agency bills:

- House Bill (HB) 2283, PERS Modernization Fixes — **PASSED**
- HB 2284, Divorce Fee Increase — **PASSED**
- HB 2285, Social Security Update Statutes — **PASSED**
- HB 5033, PERS Agency Budget Bill — **PASSED**

Legislative update

PERS has begun implementation this month for bills that affect both:

- PERS, the plan.
- PERS' operation as a state agency.

We will inform employers about bills that affect them.

This webpage will contain a list of bills that affect PERS, the plan:

- <https://www.oregon.gov/pers/Pages/Legislation/Legislation-Impacting-PERS.aspx>

Actuarial update

Jake Winship, PERS' Associate Actuary

Actuarial update

New actuarial business specialist

Troy Phillips

Joined PERS on May 8, 2023.

Worked for Oregon Employment Department.

Responsible for duties previously performed by MaryMichelle Sosne:

- Principal contact for requests emailed to actuarial.services@pers.oregon.gov.
- Communications coordinator for actuarial section:
 - Guides to understanding.
 - Website information.
 - Side account inquiries.
 - Contribution rate questions.

Actuarial update

Side account overview

Definition of side account

Lump-sum payment to prepay all or part of an employer's pension liabilities.

- Attributed solely to the employer.
- Held separately from other employer reserves.
- Cannot be withdrawn once deposited.

Invested

- Money is invested in the PERS Trust.
- Subject to same earnings and losses as all other investments in the Oregon PERS Fund.

Benefits

- Establishing a side account increases employer assets.
- Side account balance used to calculate side account rate offset.

Actuarial update

Side account overview

Calculation of side account rate offset

Rate offset reduces employer net contribution rates for specified period.

- Calculated similarly to Unfunded Actuarial Liability contribution rate.
- Starting with 2022 valuation, will reflect lag in implementing new rate.
- Annuity factor is calculated based on:
 - Remaining period of amortization.
 - Assumed interest rate (currently 6.9%).
- Side account balance is divided by this annuity factor.
- This quotient determines dollar amount to be charged in upcoming period.
- The dollar amount thus determined is divided by valuation payroll projected for period to determine offset rate.

Actuarial update

Side account overview

Expiration of side accounts

Majority of side accounts are scheduled to fully amortize on 12/31/2027:

- 183 out of 349 (52%).
- OHSU has two expiring before this date (out of seven current side accounts):
 - One each in 2023 and 2025.
 - Account balances are monitored each month.
- Only 15 other side accounts are currently set to amortize before 2037.

Actuarial update

Side account overview

Expiration of side accounts

Key items to consider when planning actions to resolve:

- Cash flow concerns for employers using pension obligation bonds.
- Challenges implementing mid-biennium rate changes.
- Desire to not “over withdraw” side account balances.

Actuarial update

Side account overview

Proposed method when side accounts expire

For the 2025 valuation, consulting actuary will determine the 2027-29 biennium contribution rate for each employer.

- Contribution rate will **not** reflect any offset for side accounts expiring 12/31/2027.
- Side account offset rates will be calculated for all other side accounts.

Actuarial update

Side account overview

Proposed method when side accounts expire

Shortly after end of 2025-27 biennium, account balance of every expiring side account will be determined as of 6/30/27.

Account balance will be credited to employer's EDX account; subsequent contributions due will reduce this credit until depleted.

We will continue to develop these concepts and provide more information at upcoming EAG meetings.

Actuarial update

Actuarial valuation reports

Edits to 2022 valuation reports

Based on recommendations from the Employer Advisory Group and Gabriel, Roeder, Smith & Company audit.

- Employer contribution rates display will:
 - Compare new contribution rates to current contribution rates.
 - Show Multnomah Fire District #10 and rate collar impact to unfunded actuarial liability.
- Side account information:
 - Rate offset beginning date for every account.
 - Rate offset ending date for every account.

Actuarial update

Actuarial valuation reports

Executive Summary

Employer Contribution Rates (continued)

Employer Rates Effective July 1, 2023

	Payroll				
	Tier One/Tier Two			OPSRP	
	Default All Tier One/Tier Two Payroll	Optional Separate Rates General Service Police & Fire		General Service	Police & Fire
Pension					
Normal cost rate	16.27%	15.14%	21.79%	9.89%	14.68%
Tier One/Tier Two UAL rate ¹	12.46%	12.46%	12.46%	12.46%	12.46%
Multnomah Fire District #10 UAL rate	0.15%	0.15%	0.15%	0.15%	0.15%
OPSRP UAL rate	1.69%	1.69%	1.69%	1.69%	1.69%
Pre-SLGRP pooled liability rate ²	1.33%	1.33%	1.33%	1.33%	1.33%
Transition liability/(surplus) rate ³	0.00%	0.00%	0.00%	0.00%	0.00%
Side account rate relief ³	(6.59%)	(6.59%)	(6.59%)	(6.59%)	(6.59%)
Member redirect offset ⁴	(2.40%)	(2.40%)	(2.40%)	(0.65%)	(0.65%)
Net employer pension contribution rate	22.91%	21.78%	28.43%	18.28%	23.07%
Retiree Healthcare					
Normal cost rate	0.13%	0.13%	0.13%	0.00%	0.00%
UAL rate	(0.13%)	(0.13%)	(0.13%)	0.00%	0.00%
Net retiree healthcare rate	0.00%	0.00%	0.00%	0.00%	0.00%
Total net employer contribution rate	22.91%	21.78%	28.43%	18.28%	23.07%

Employer Contribution Rates Effective July 1, 2021

Actuarial update

Actuarial valuation reports

Employer Contribution Rates Effective July 1, 2021

	Payroll				
	Tier One/Tier Two			OPSRP	
	Default All Tier One/Tier Two Payroll	Optional General Service	Separate Rates Police & Fire	General Service	Police & Fire
Pension					
Normal cost rate	15.32%	14.30%	20.29%	8.64%	13.00%
Tier One/Tier Two UAL rate ¹	12.46%	12.46%	12.46%	12.46%	12.46%
Multnomah Fire District #10 UAL rate	0.14%	0.14%	0.14%	0.14%	0.14%
OPSRP UAL rate	1.69%	1.69%	1.69%	1.69%	1.69%
Pre-SLGRP pooled liability rate ²	1.52%	1.52%	1.52%	1.52%	1.52%
Transition liability/(surplus) rate ³	0.00%	0.00%	0.00%	0.00%	0.00%
Side account rate relief ³	(6.63%)	(6.63%)	(6.63%)	(6.63%)	(6.63%)
Member redirect offset ⁴	(2.45%)	(2.45%)	(2.45%)	(0.70%)	(0.70%)
Net employer pension contribution rate	22.05%	21.03%	27.02%	17.12%	21.48%
Retiree Healthcare					
Normal cost rate	0.16%	0.16%	0.16%	0.00%	0.00%
UAL rate	0.00%	0.00%	0.00%	0.00%	0.00%
Net retiree healthcare rate	0.33%	0.33%	0.33%	0.00%	0.00%
Total net employer contribution rate	22.38%	21.36%	27.35%	17.29%	21.65%

¹ Includes any impact of rate collar developed in the system-wide actuarial valuation report.

² Pre-SLGRP pooled liability rate developed in the system-wide actuarial valuation report and is amortized over the period ending December 31, 2027

³ The transition liability/(surplus) rate and side account rate relief shown may be reduced such that the net pension contribution rate does not go below 0.00%.

⁴ Redirected member contributions under Senate Bill 1049 (2.50% of payroll for Tier One/Tier Two and 0.75% of payroll for OPSRP) will offset employer contribution rates. Redirect does not apply to members with monthly pay below a threshold. The values shown in the table incorporate an estimate of the effect of this limitation.

Actuarial update

Actuarial valuation reports

Side Account Information

Side Account Balances

	Deposit Date	Rate Offset End Date	December 31, 2021	December 31, 2020
Side Account 1	10/31/2002	12/31/2027	\$200,900,774	\$202,791,920
Side Account 2	4/30/2003	12/31/2027	267,566,703	268,011,506
Side Account 3	12/13/2019	12/31/2037	12,023,081	10,231,288
Side Account 4	7/15/2021	12/31/2039	417,707,748	0
Side Account 5			0	0
Total			\$898,198,306	\$481,034,714

Actuarial update

Actuarial valuation reports

Development of Side Account Rate

The rate relief attributable to an employer's side account is determined by amortizing the side account balance on the valuation date over a fixed period and expressing the result as a percentage of combined valuation payroll. For side accounts established prior to December 31, 2009, the fixed period ends December 31, 2027. For side accounts established at a later date, the default fixed period ends 18 years after the first rate-setting valuation following its creation, though employers can select a shorter period under certain specified circumstances. For employers with more than one side account, the total side account rate is determined by calculating the rate on each side account separately and adding the rates together.

	December 31, 2021			December 31, 2020		
	Combined valuation payroll			Combined valuation payroll		
		\$419,165,926			\$381,823,828	
	Side account balance	Amortization factor	Side account rate	Side account balance	Amortization factor	Side account rate
1.	\$200,900,774	5.363	(8.94%)	\$202,791,920	6.158	(8.62%)
2.	267,566,703	5.363	(11.90%)	268,011,506	6.158	(11.40%)
3.	12,023,081	12.232	(0.23%)	10,231,288	12.802	(0.21%)
4.	417,707,748	13.353	(7.46%)	0		0.00%
5.	0		0.00%	0		0.00%
Total	\$898,198,306		(28.53%)	\$481,034,714		(20.23%)

Actuarial update

Important dates

- July 28 PERS Board Meeting
 - Assumptions and methods adopted by board in consultation with actuary.
- September 29 PERS Board Meeting
 - System-wide 12/31/22 actuarial valuation results.
- December 1 PERS Board Meeting
 - Advisory 2025-27 employer-specific contribution rates.
- December 2023
 - Individual employer valuations available online.
 - **Sign up for GovDelivery to be notified.**

Employer Service Center update

Brandon Armatas, Data Services Section Manager

Employer Service Center (ESC) update

Paid Leave Oregon reporting recap

Paid Leave Oregon benefits begin September 3, 2023.

PERS reporting requirements remain the same.

- Explained in the [“How do I report Paid Leave Oregon contributions and payments?” FAQ](#).

Type of contribution	Paid by	Report to PERS as subject salary	Notes
Employer contribution	Employer	No	This payment to the Employment Department is similar to general employer contribution obligations paid to PERS to fund retirement benefits. Paid through combined payroll report form.
Employee Contribution	Employee	No	This is paid as a deduction from the employee’s gross wages. Gross wages were already reported as subject salary, so the contribution is not reported to PERS.
Employee Contribution	Employer (pick-up)	Tier One/Two: No OPSRP: Yes	Employer is paying insurance premium on behalf of the employee. ¶ - Tier One/Tier Two: Non-subject salary because Oregon Revised Statute (ORS) 258.005(26)(c)(B) specifically excludes. ¶ - OPSRP: Subject salary because ORS 238A.005(17) (c) does not specifically exclude.

The [Paid Leave Oregon website](#) provides additional details about the program and employer requirements.

ESC update

Employer training

Education and training are critical to building capabilities, trust, and confidence.

Signals that indicate a need to revitalize training:

- Changes to PERS technology and policy.
- Employer feedback.
- Counter-effort to turnover.
- Gaps identified in training model/platform offerings.

PERS is working to invest more time and effort in improving employer education and training efforts.



ESC update

Employer training

Cohort of key agency stakeholders is mapping out training and engagement plans. Training will be learning-centric, meaning accessible when it is needed.

Other highlights:

- Designed for both beginners and advanced users.
- Interactive by nature.
- Supplements instructor-led offerings when possible.
- Adjustable in real time.

ESC update

Employer training

Current and future offerings

The Employer Reporting Guide series

- Replaces existing employer manuals.
- 28 guides and 8 quick references.
- Final 16 guides in development.

Videos

- Short snapshot training videos, such as “How to Hire a New Employee.”
- Four in development.

Instructor-led training

- Webinars led by ESC experts.
- Two previous courses being updated and expanded into five courses with companion manuals.
- In development.

Interactive training

- On-demand, interactive trainings set up via Workday Learning.
- In development.

Communications update

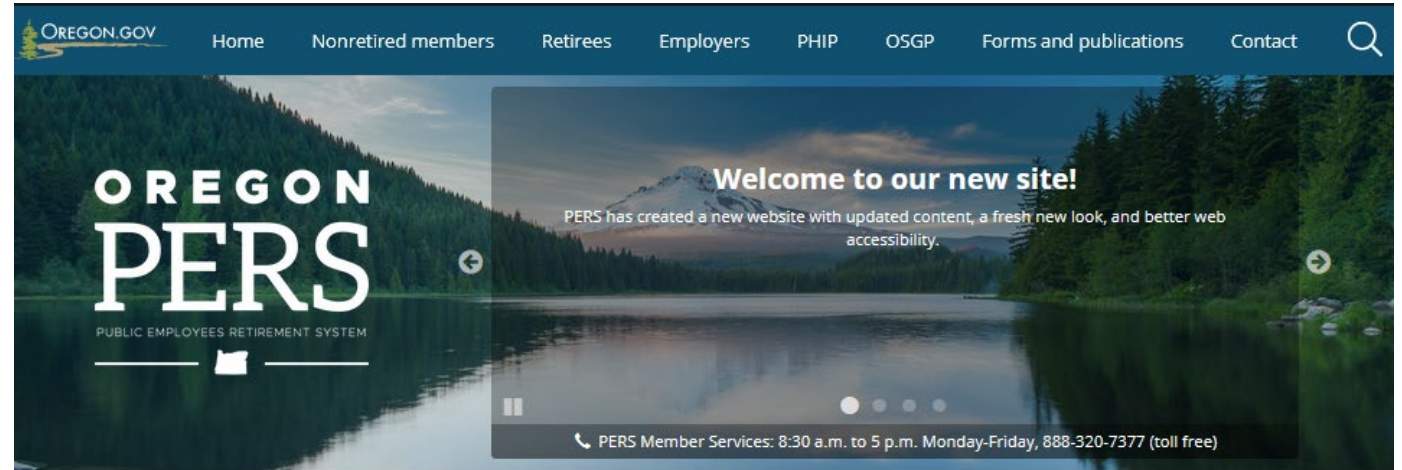
Shawn Harper, Employer Communications Specialist

Jonathan Yost, Senior Marketing and Communications Specialist

Communications update

New website

- E-Gov postponed June 14 launch.
- Launched on June 29.
- Designed for easier and faster navigation.
- Optimized for mobile.



<h3>Nonretired members</h3> <p>Online Member Services</p> <p>Tier One / Tier Two plans</p> <p>Oregon Public Service Retirement Plan</p> <p>What plan am I in?</p> <p>Nonretired member newsletters</p>	<h3>Retirees</h3> <p>Online Member Services</p> <p>Work after retirement</p> <p>Health insurance program</p> <p>Tax information</p> <p>Benefit payment information</p>	<h3>Employers</h3> <p>EDX Login</p> <p>EDX availability</p> <p>Employer contribution rates</p> <p>Monthly newsletter</p> <p>Training</p>
<h3>News and announcements</h3> <p>Retiring? Planning to work after retirement? Tell employers these two things</p> <p>Retiring? Planning to work after retirement? Tell employers these two</p>		<h3>Events</h3> <p>All About OPSRP with Financial Planning</p>

Communications update

Website

Employers site

Updated and enhanced.



EDX support



- Using the EDX reporting system
- Password reset
- Requesting help
- Automated data upload

Help, guides, and resources



- Employer Service Center
- Employer publications
- Training
- Employer Advisory Group

Actuarial and financial



- Actuarial and financial resources
- Contribution rates list
- Governmental Accounting Standards Board (GASB) resources

Most-used links listed first

All other information categorized below

About PERS



Resources for employer reporters



Popular links



Education



Communications update Website

New to this version of PERS website

Individual pages for
each part of PERS
benefit package.

Instructions for employers
interested in joining PERS.

Individual pages for
PERS programs.

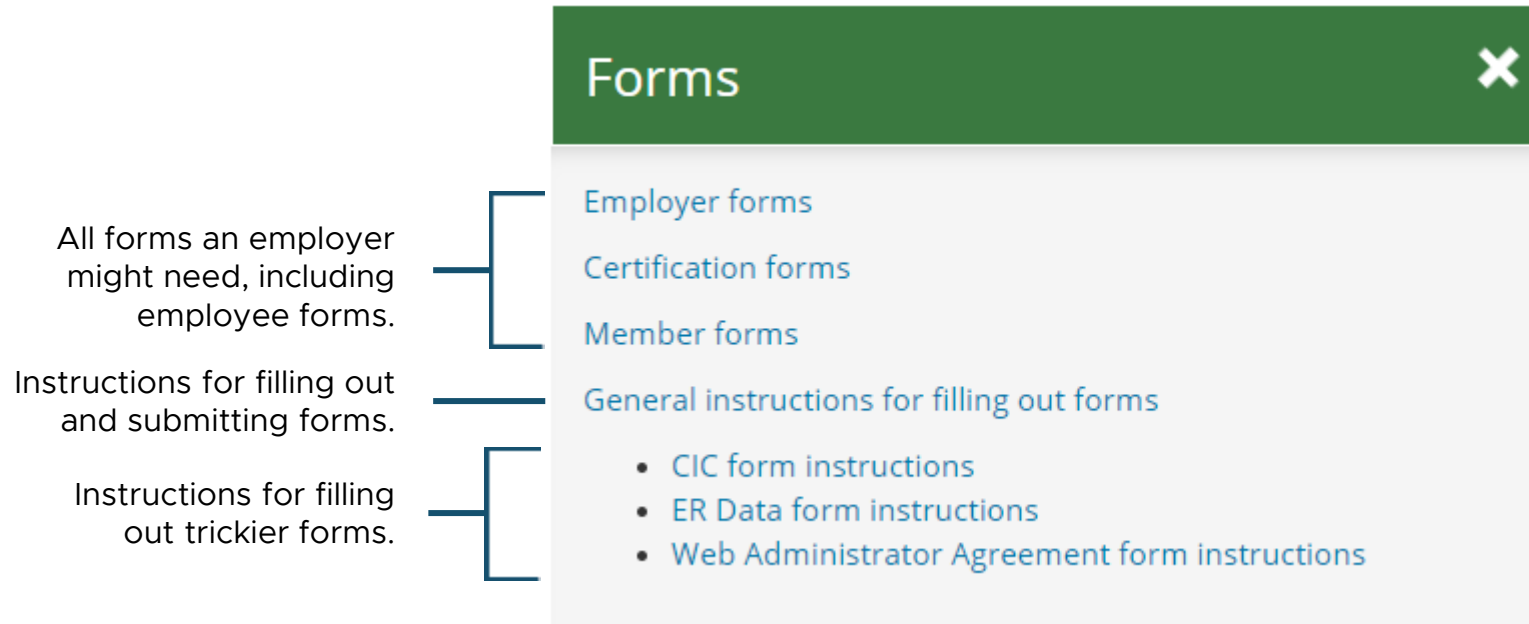
About PERS

- [What is PERS?](#)
- [About the PERS pension](#)
- [About the Individual Account Program \(IAP\)](#)
- [About the Employee Pension Stability Account \(EPSA\)](#)
- [About supplementary PERS plans](#)
- [About joining PERS](#)
- [Annual reports](#)
- [Overview of PERS benefits for new employees](#)
- [PERS by the Numbers !\[\]\(9a53fe79a03d38d8322f7a2c5a875b36_img.jpg\)](#)
- [Senate Bill 1049 \(2019\)](#)
- [Rules and statutes](#)
- [Disability Benefits guide !\[\]\(01f19d40f03100aa8a158c4891453b0d_img.jpg\)](#)
- [Family and Medical Leave guide](#)
- [Salary Limit program](#)
- [Work After Retirement program](#)
- [Unused Sick Leave program](#)

Communications update

Website

New to this version of PERS website



Communications update

Website

New to this version of PERS website

Q1: What is the Benefit Equalization Fund (BEF) admin fee?

Q2: What is the Social Security fee?

Q3: What is the “wash”?

Q4: Can I download my PERS invoice into my budgeting program?

Q1: What is the Multnomah Fire District #10 rate?

Q2: Why is PERS so expensive? Will rates go down?

Frequently asked questions

EDX invoice questions

EDX reporting questions

Questions about reporting special circumstances

Actuarial questions

PERS questions

Voluntary contributions questions

Q1: What is data verification?

Q2: Why do only local-government employers list work-period dates?

Q3: How do I calculate unused sick leave?

Q4: Why do I have to wait until the next business day to see if my reports posted successfully?

Q5: How do I report Paid Leave Oregon contributions and payments?

Q6: What are the criteria for determining if an employee is eligible to earn benefits?

Q7: What are subject wages?

Q8: What is hire intent and how do I determine it?

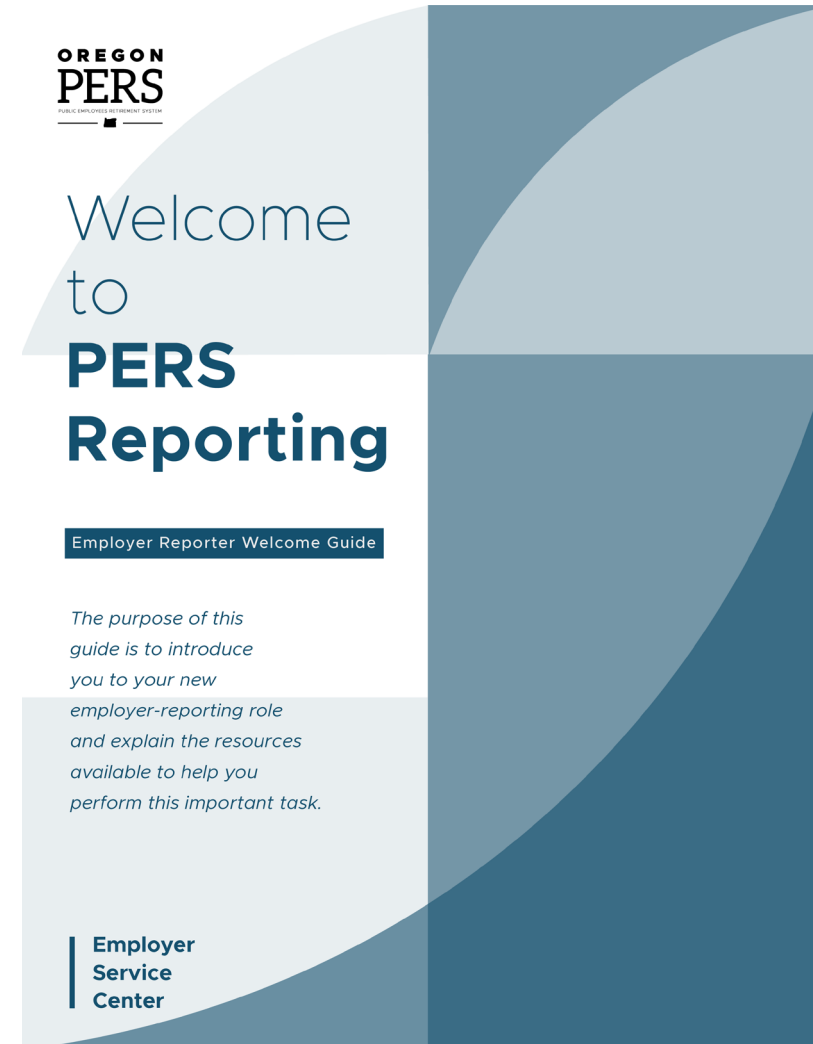
Q9: How do I determine if an employee is qualifying for a partial year?

Communications update

Employer guides

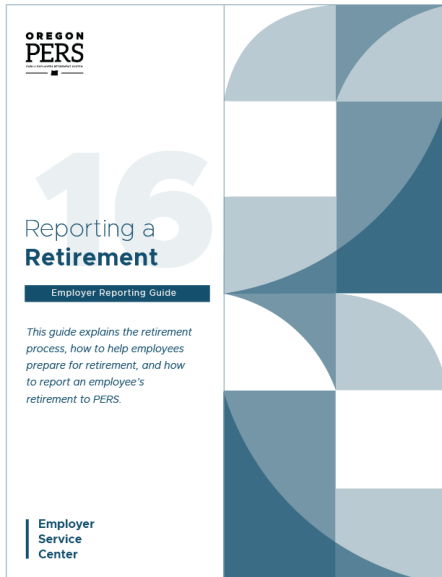
New [Employer Reporter Welcome guide](#).

- Sent to new employer reporters.
- Explains what EDX is, what they'll be doing, how to learn the role, and where to get support.

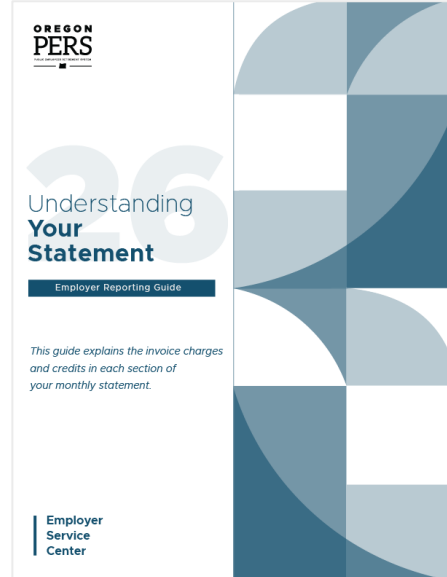


Communications update

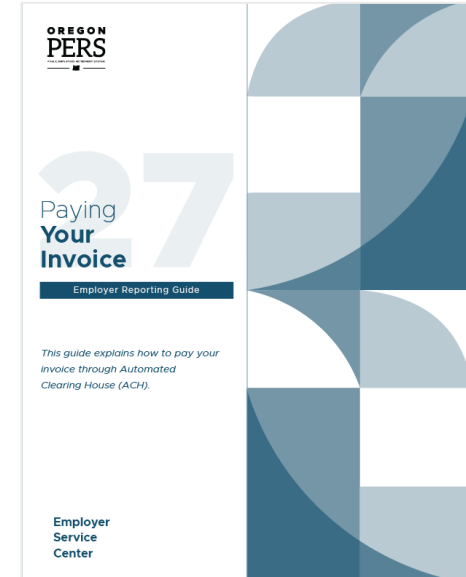
Employer guides



- How to help employees prepare for retirement, from first day at work until first day of retirement.
- Benefits for each tier and job class.
- How to apply.



- Explanations of every screen in your statement.
- Definitions of different charges and credits.



- How to pay your invoice through Automated Clearing House (ACH).
- Explanations of paying by debit or credit.

Communications update

Employer videos



- Demonstration of how to report a new hire in EDX.
- New instructions for choosing non-binary gender.



- How to become a web administrator.
- Demonstrations of what a web administrator does.



- How to become an employer reporter.
- What an employer reporter does.
- How to learn the role.

Communications update

PERS 2023 Expo

Registration for Expo opens in August.

- [Registration link.](#)

Expo theme is **Destination: Retirement**

Encourage employees to attend to:

- Better understand their retirement benefits.
- Know when to check in with PERS.
- Learn how to get an estimate of their future pension.
- Understand the payout options available based on tier.



Open discussion

Open discussion

Any questions or comments for PERS?

Questions for each other?



OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



Thank you!

