



Reporting or Changing **'Average Overtime'**

Employer Reporting Guide

This guide explains how to choose the value of average overtime hours on a new-hire record or Demographic Correction Request.

**Employer
Service
Center**



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Introduction

“Average overtime” is an estimate of the number of overtime hours a position might be expected to work in a calendar year. It is determined at the class or position level, not on an individual employee level.

The purpose of the average overtime number is to put a cap on the amount of overtime hours that can be included in calculating an employee’s final average salary when they retire or withdraw from PERS. This capped amount per classification is determined by the employer.

Who is affected by average overtime

Average overtime only affects members of the Oregon Public Service Retirement Plan (OPSRP). However, because the Average Overtime field is required when submitting a new-hire record, you need to enter a value for average overtime when you hire a Tier One or Tier Two member. Because it doesn’t affect those tiers, you can enter any value.

Effect on OPSRP members	Effect on Tier One/Tier Two members
<p>The average overtime rate puts a limit on how much of an OPSRP employee’s reported overtime can be applied toward their final average salary (FAS).</p> <p>When an OPSRP member works more overtime hours than the average overtime rate reported by their employer, the salary earned in excess of the average overtime cap is excluded from their FAS.</p> <p>It does not affect how much overtime an OPSRP member can work or how much the person is paid for overtime.</p>	<p>No effect. The amount of overtime pay that a Tier One/Tier Two member earns is not capped; however, you have to enter an average overtime value to get the new-hire record to post.</p> <p>You can choose any number, including zero.</p>

How to estimate average overtime

For each job classification, the employer establishes a reasonable number of overtime hours per calendar year that someone in that job class is expected to work.

If a job class does not get paid for overtime (e.g., a school employee), enter 0. If a job class may occasionally work overtime (e.g., a team of construction workers), choose a number up to the maximum amount they might work. For a job class that works a lot of overtime (e.g., police officers), you can choose the maximum amount allowed.

Example

At Alphet County, all OPSRP employees in an accounting role are assigned an average overtime of 100 hours in EDX. When an accountant retires, the overtime hours included in calculating their FAS is capped at 100. The accountant was paid for all the hours they worked, but no more than 100 hours of the overtime salary they earned per year is included in the FAS calculation.

Year	OT worked	Subject salary reported to PERS	OT hours included for FAS (up to capped amount)	OT salary included for FAS
2022	148	6,438.62	100	\$4,350.42
2021	112	4,319.84	100	\$3,857.00
2020	82	2,642.07	82	\$2,642.07
Totals	342	13,400.53	282	\$10,849.49

This produces overtime salary of \$10,849.49 to be added to the member's FAS.

How to report average overtime for a new hire

The Average Overtime Hours field is required when reporting a new hire.

- 1 Predict average expected overtime hours for that position per calendar year.
Employees in the same job classification (e.g., teacher, firefighter, receptionist, payroll specialist) have the same number of expected overtime hours.
- 2 Create a new (or edit an existing) Demographics and Adjustment report.
- 3 Add a new Detail 1 record.

ADD/EDIT MEMBER RECORDS

Working With SSN ██████████

Choose the type of record to create from the list below, then click [Add New Record](#).

ADD NEW RECORD

Detail 1 - Member Demographics.
 Detail 2 - Wage and Service.

[Add New Record](#)

Click **OK** to return to the Edit Retirement Detail Reports page.

[OK](#)

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On the blank Member Demographics screen, fill in the following required fields:

SSN: Auto filled.

Status Code: 01 or 15 (depending on if the position will qualify for benefits or not).

Status Date: Their first day on the job.

Name: Auto filled.

Address: In all caps.

Continued

DETAIL 1 - MEMBER DEMOGRAPHICS:	
SSN	*****
Status Code	15 - Non-Qualifying hire ▼
Status Date	11/14/2022 (MM/DD/YYYY)
Last Day Service	<input type="text"/> (MM/DD/YYYY)
Old SSN	<input type="text"/>
First Name	JOHN
Last Name	DOE
Middle Name	<input type="text"/>
Name Change Indicator	N
Address - 1	135 7TH AVE
Address - 2	<input type="text"/>
Address - 3	<input type="text"/>
City	MEDFORD
State	OREGON ▼
Zip - 1	97501

Date of birth

Gender: Current legal gender.

(If employee does not identify as male or female, choose a gender on the record, and then send a DCR to PERS asking us to change the gender to Non-Binary/Other.)

Job Class Code:

- Most commonly:
- 01 - General Service.
- 02 - Police and Fire.
- 09 - School employee.

Average Overtime Hours: The calendar-year overtime hours expected for this position.

Contract No. of Months: For school employees only. How many months in a year a school employee (job class 09) is expected to work for their education employer. The options are 09, 10, 11, and 12. An employee whose job class is other than 09 should *always* have the 00 default.

Zip - 2	<input type="text"/>
Province	<input type="text"/>
Country Code	USA <input type="button" value="v"/>
Postal Code	<input type="text"/>
Date Of Birth	07/31/2000 <small>(MM/DD/YYYY)</small>
Gender	Male <input type="button" value="v"/>
PERS Job Class Code	02 - Police and Fire <input type="button" value="v"/>
Average Overtime Hours	200 <input type="button" value="v"/>
Unused Sick Leave Hours	<input type="text"/>
Contract No. of Months	00 <input type="button" value="v"/>
Employer Site Distribution Code	<input type="text"/>
Non PERS Data Memo	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

[Learn more](#)

For DCR instructions, go to the “Submitting a DCR” section in this guide or read [employer reporting guide 20, Creating a DCR](#).

For more instruction on assigning a nonbinary gender, watch the video “[Reporting a New Employee](#).”

How to find an employee's reported average overtime number

You can find an employee's reported average overtime number by looking it up in EDX or asking your ESC representative to look it up.

View Employee Info

- 1 In the Site Navigation menu, click View Employee Info.
- 2 Enter the employee's last name, Social Security number, or PERS ID in the search field and click the **Search** button.

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

BS BIG SCHOOL #1
Employer Number: 06000

VIEW EMPLOYEE INFORMATION

[Download CSV File of Employee Addresses](#)

Please enter a Last Name, SSN or PERS ID to access employee data.

Last Name

SSN or PERS ID

- 3 If you search by name and get a long list of choices, scroll through the list to find the right person.
- 4 Click the employee's SSN. The Employment History screen opens.

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- 5 Employee information is listed horizontally. You may need to scroll to the right to view the Average OT Hours column.

AS [Redacted Name]

SSN [Redacted] Contribution Start Date [Redacted]
Date of Birth [Redacted] 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	Average OT Hours
NQ	06/06/2016	06/08/2016	07/30/2016	0.000					
	06/06/2016		07/30/2016			School Employee	Non-Qualifying Service	OPSRP	2000

Note: The verification of an employment also includes the net Unused Sick Leave. If this information is incorrect, please submit a DCR.

Contact ESC

You can review the average overtime for all your active employees by requesting this information from your [ESC representative](#).

How and when to change average overtime

There are three situations that might necessitate changing an employee's average overtime number. In each situation, you need to submit a demographic correction request to PERS to request the change.

For the first two situations listed below, the change is effective going forward. For the third situation, the change can affect past records, if applicable.

When an employee's position changes

When an employee begins a new position with your organization, submit a Demographic Correction Request (DCR) with the employee's new average overtime number. Be sure to provide an effective date for the change in the Comments section of the DCR.

When the average overtime associated with a classification group changes

To make a change for a large group of employees in the same classification, contact your ESC representative by phone or email. They can work with you to upload a list or spreadsheet of affected employees.

When an error is identified

If you find that the average overtime reported for an employee is incorrect, you need to submit a DCR to ask PERS to change it.

In the DCR Comments box, explain your error and ask PERS to correct it. Make sure to specify the effective date of the change. For example, if you hire someone on March 15, 2023, and discover the error on March 1, 2024, the effective date is March 15, 2023.

For instructions on submitting a DCR, see "Submitting a DCR" on the next page.

Submitting a DCR

Submitting a DCR is covered in detail in [employer reporting guide 20, Creating a Demographic Correction Request](#). For convenience, a brief overview is provided below.

- 1 Select **Work List** from the main Site Navigation menu.
- 2 Click the **Create Demographic Correction Request (DCR)** button.

The screenshot shows the employer reporting interface for 'BIG SCHOOL #1' (Employer Number: 06000). The 'SITE NAVIGATION' menu on the left includes 'Work List', which is highlighted with a red box. The main content area is titled 'WORK LIST' and contains a 'Create Demographic Correction Request (DCR)' button, also highlighted with a red box. Below the button is a table of work items with columns for SSN, PERS ID, Last Name, First Name, Plan, Year, Request Date, Work Item Type, and Status. The table shows two rows of data for PERS-Tier 2 employees.

SSN	PERS ID	Last Name	First Name	Plan	Year	Request Date	Work Item Type	Status
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	PERS-Tier 2	2003	10/26/2022	Salary Cert - Disability	New
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	PERS-Tier 2	2003	10/26/2022	Salary Cert - Service	New

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- 3 On the DCR screen, click the radio button for the employee's job segment that you want changed. The screen expands.
- 4 Use the drop-down menu to update the Average OT Hours field.
- 5 Provide any additional information in the Comments box. Click **Save**.

The screenshot displays a web form for reporting or changing average overtime hours. The form includes several sections with input fields and dropdown menus:

- Start Date:** From 05/01/2012 To []
- Term/End Date:** From [] To [] Remove Term/End Date
- Last Day Service:** From [] To []
- Job Class:** From School Employee To [] Start Date [] End Date []
- New Position Type:** [] Start Date [] End Date []
- Average OT Hours:** A dropdown menu is open, showing a list of values from 0 to 1800 in increments of 100. The value 0 is currently selected.
- Contract No. of Months:** []
- Hire Intent:** []
- Unused Sick Leave:** []
- Review Contribution Start Date:** []
- Delete Position:** []
- Comments:** A text area for providing additional information.

At the bottom of the form, there are two buttons: **Save** and **Cancel**.

- 6 Your ESC representative will make the change. If they have any questions, they will send the DCR back to you with their question. It will appear in your Work List.