OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Reporting
a New
Employee

Employer Reporting Guide

This guide explains how to report a new employee to PERS, plus how employees establish membership and earn benefits.

**Employer
Service
Center**

Contents

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Introduction

When you hire a new employee, you need to report that new employee to PERS as explained in this guide. If they are new to PERS, this creates an account for them in the PERS system so they can start earning retirement benefits. If they are an existing PERS member, the report informs PERS of their new job so they can continue to earn PERS benefits (if they qualify).

This guide explains how employees qualify for PERS membership and how to report your new employee to PERS.

Qualifying for PERS membership

New, non-PERS member

PERS has three membership tiers: Tier One, Tier Two, and Oregon Public Service Retirement Plan (OPSRP). Tier One and Tier Two are closed to new members; all new employees who qualify for membership become members of OPSRP.

To qualify for OPSRP membership, a new employee must meet four requirements:

1 Work for six months (called "wait time") in a qualifying position (established by a "qualifying" hire intent or working more than 600 hours in a calendar year).

2 Work for one employer with no break in service longer than 30 consecutive working days over the six-month wait time.

3 Still be employed with same employer on the last day of the wait time and the first day of membership, called their contribution start date (CSD).

4 Still be employed with that employer on the first calendar day of the month following the wait time.

Existing PERS member

If your new employee is already a PERS member, they do not have to complete a six-month wait time. You will pay contributions on their salary and start reporting the 6% IAP contribution beginning with their first day of work.

PERS retiree

PERS retirees do not earn PERS benefits. For instructions on how to employ a retiree, read employer reporting guide 8, *Hiring a PERS Retiree*.

Employees exempted from PERS membership

Do not report the following types of new employees to PERS:

- Independent contractors. (Refer to Oregon Revised Statute (ORS) 459-010-0032(2).)
- Inmates of a state institution.
- Student employees (e.g., work study program). (Refer to ORS 459-005-0025.)
- People in the United States on a training or education visa.
- People who live and work in a country other than the United States.
- Employees of employers who participate in an optional or alternative retirement plan.

Earning PERS benefits

Only PERS members in "qualifying" positions earn retirement benefits. Benefits include a pension, an Individual Account Program (IAP) account, and an Employee Pension Stability Account (EPSA). The type and amount of benefits they earn depend on:

- Their PERS plan (i.e., Tier One, Tier Two, or OPSRP).
- Their PERS job classification (e.g., School Employee, General Service, Police and Fire, Legislator).
- Their salary.
- Their service credit (i.e., the number of years and months they work as a qualifying active member).

Learn more about how PERS works in employer reporting guide 1, *Overview of PERS*.

Qualifying vs. non-qualifying position

Before reporting an employee's hours and wages to PERS, you need to know if their job is "qualifying" (i.e., eligible to earn benefits) or "non-qualifying." Your organization pays contributions to PERS only for qualifying positions, so it is important to know the qualification status in order to pay the correct amount to PERS.

To determine if a position is qualifying or non-qualifying (also called "hire intent"), complete these steps.

1. **Answer this question**: *Is this position expected to work 600 hours or more in any calendar year?*

   Yes — Hire intent for the job segment is **qualifying**. You do not need to do step 2. Use status code 01 – Qualifying New Hire when you report the new employee.

   No — Hire intent for the job segment is **non-qualifying**. However, before reporting the employee to PERS with a status code 15 – Non-Qualifying Hire, complete step 2.

2. **Do a status check** to find out if a non-qualifying position is working more than 600 hours a year.

   Once an employee works 600 hours or more in a year, they qualify for benefits. Employees who work more than one part-time position can qualify for benefits based on their combined hours. Therefore, you need to do a status check to find out if a part-time employee has reached or surpassed 600 hours before you submit the new-hire record. You have three options for doing a status check:

   a) Call the ESC Call Center and ask them to check the employee's qualification status.

   b) Contact your ESC rep and ask them to check the employee's qualification status.

   c) Use the Status Check function in EDX. For instructions, read employer reporting guide 24, *Running Reports*.

Job class code

PERS provides slightly different benefits to employees based on the type of job they have, called their "job classification." The job class code assigned to an employee's position determines which PERS benefit structure applies to them. For example, an employee in the Police and Fire job class earns different benefits than someone in General Service.

Important: Job class codes cannot be changed retroactively. If you discover that a job class code was entered incorrectly, submit a Demographics Correction Request (DCR) or contact your ESC representative.

For instructions on submitting a DCR, read employer reporting guide 20, *Creating a DCR.*

For definitions of job codes, see employer reporting quick reference "EDX Job Class Codes."

Average overtime

"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 average overtime number limits the amount of overtime hours that can be included in calculating an employee's final average salary (FAS) at retirement. It does not limit the amount of overtime each employee is allowed to work nor how much they are paid for that overtime.

The average overtime number only affects OPSRP employees; however, a number must be entered into the Average Overtime field for a Tier One or Tier Two employee to get the record to post.

To learn more about average overtime, read employer reporting guide 18, *Reporting or Changing 'Average Overtime.'*

Reporting a new employee

You must submit a Detail 1 record to PERS as soon as you hire an employee. You must submit this record (and wait for it to post) **before** you report any wages for the employee.

Create a Demographics and Adjustment report

1 Click the **Work on Reports** link in the EDX Site Navigation menu. The Work on Wage and Contribution Reports screen appears.

2 Click the Create a New Report link at the top of the page.

3 The Report Creation Form window opens. Enter the report date and select Report Type: Demographics and Adjustment Report. Click the 3rd radio button to create an empty report to which you can add single records.

Tips: Use any report date other than a Regular report date.

Do not submit more than one Demographics and Adjustment Report with the same report date. EDX will alert you that you already have a report with that date.

4 The confirmation screen appears. Click the Return to Report Summary Page link to return to the Work on Wage and Contribution Reports page.

CREATE RETIREMENT DETAIL REPORT CONFIRMATION

The wage and contribution report has been successfully created for the following :

Report Date   11/10/2022

What Next?

You may continue to work with the web site if you desire. Click on any link below to visit other areas of the web site.

View Information about your Agency
View your Agency Statement
View the Current Employee List for your Agency
Return to Report Summary Page

Create a Detail 1 Member Demographics record

1 Find the report you just created. It will be in "Added" status under Unposted Demographics and Adjustment Reports. Click the underline edit link for that report.

2 The Edit Retirement Detail Reports page appears. Scroll down to Option 2 - Add or Edit a Record, enter your new (or returning) employee's Social Security number (no dashes), and click **Add or Edit Record**.

OPTION 2 - ADD OR EDIT A RECORD

You may add a new record or edit an existing record. Enter a Social Security Number to view or edit a record for that employee. Or add a new record by entering the Social Security Number and completing the form that appears on the following page.

SSN

Add or Edit Record

3 On the Add/Edit Member Records screen, under Add New Record, leave the default record selection (Detail 1), and click **Add New 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

4 On the Detail 1 Member Demographics page, fill in the following required fields:

SSN: Auto filled.

Status Code:
01 – Qualifying New Hire or
15 – Non-Qualifying Hire

(Refer to the "Qualifying vs. Non-Qualifying" section in this guide for more information.)

For a retiree, use status code 11. Use 13 only if they are canceling their retirement and returning to active PERS membership.

Status Date: Their first day on the job or returning as a retiree.

Name: Auto filled.

Address: In all caps.

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	•••••••••
Status Code	01 - Qualifying New Hire
Status Date	11/14/2022
	(MM/DD/YYYY)
Last Day Service	
	(MM/DD/YYYY)
Old SSN	
First Name	JOHN
Last Name	DOE
Middle Name	
Name Change Indicator	N
Address - 1	1234 STREET
Address - 2	
Address - 3	
City	CITY NAME
State	OREGON
Zip - 1	97212
Zip - 2	
Province	
Country Code	USA
Postal Code	

Continued

Date of birth

Gender: Current legal gender.*

Job Class Code: Choose from the pull-down list. Most common codes are 01 - General Service. 02 - Police and Fire. 09 - School employee.

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

Contract No. of Months: 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.

Date Of Birth	07/31/2000 (MM/DD/YYYY)
Gender	Male
PERS Job Class Code	01 - General Service
Average Overtime Hours	100
Unused Sick Leave Hours	
Contract No. of Months	00
Employer Site Distribution Code	
Non PERS Data Memo	

[Save] [Cancel]

*For employees who do not identify as female or male, follow this process.

1. In the Gender field, select Female or Male. It's a required field, so you must select something to get the record to post.
2. Once the record posts, create a Demographic Correction Request (DCR) for that employee.
3. In the Employer Comments box, ask PERS staff change the gender to Non-Binary/Other.

For DCR instructions, read employer reporting guide 20, *Creating a DCR*.

To see this process demonstrated, watch the video "Reporting a New Employee."

Explanations of fields

Required	Screen field name	Notes
∗	SSN	No dashes. Double check that this is accurate.
∗	Status Code	Codes are listed in employer quick reference guide "EDX Status Codes."
∗	Status Date	The first day working, training, or onboarding.
∗	First Name	May fill in automatically if existing PERS member.
∗	Last Name	May fill in automatically if existing PERS member.
∗	Name Change Indicator	"N" is the default. Select Y if name change is needed.
∗	Address – 1	Try to fit the whole address in this field. If the address includes a unit, apartment, or condo number, type the number in this field. Use a PO Box instead of a street address if one is available.
	Address – 2	Optional—may be needed for some addresses. Do not type a unit, apartment, or condo number in this field.
	Address – 3	Optional—may be needed for some addresses. Do not type a unit, apartment, or condo number in this field.
∗	City	All caps.
∗	State	All caps.
∗	Zip – 1	Include the extra four-digit extension if you have it.
	Zip – 2	Optional.
	Province	Use for foreign address when Country Code is other than "USA."
∗	Country Code	Choose from drop down. USA is the default.
	Postal Code	Use for foreign address, where Country Code is other than "USA."
∗	Date of Birth	MM/DD/YYYY.

Continued

Required	Screen field name	Notes
*	Gender	Current legal gender. If employee does not identify as male or female, send a DCR to PERS requesting to have the gender changed to Non-Binary/Other.
*	PERS Job Class Code	Make sure to select the correct code. Codes listed in employer reporting quick reference guide "EDX Job Class Codes."
*	Average Overtime Hours	Select the number of annual overtime hours that position is expected to require during the year. Learn more in employer reporting guide 18, *Reporting or Changing 'Average Overtime*.'

5   (Continued from page 10.) When you are finished adding all information into the Detail 1 new-hire record, click **Save**.

6   On the next screen, you can make edits to the record you just created by clicking select. If you are finished, click **OK** to return to the Edit Retirement Details Report page where you can add or edit additional records in the same report.

ADD/EDIT MEMBER RECORDS

Working With SSN

This member has one or more existing records on this report. Choose the record which you would like to edit by clicking on the **select** link. If you would like to add a new record for this member, click the Add New Record button. You may view the member's plan information before adding a new record by clicking on the Member Benefit Plans link in the navigation bar.

Select One of the records below

Select Record	SSN	Employee Name	Reported Wage Code	Status	Record Type
select			-	Edited	DTL1

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]

Release the report

1 Select **Work on Reports** to navigate to the Work on Wage and Contribution Reports screen.

2 Select the report you want to release for EDX batch validation by clicking on the Release link.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Added	08/31/2022	01/30/2007	delete	edit	n/a	View Report	View Details	n/a
Added	11/10/2022	11/10/2022	delete	edit	Release	View Report	View Details	n/a
Suspended	04/23/2021	12/29/2020	delete	edit	n/a	View Report	View Details	n/a
Suspended	06/29/2021	06/29/2021	delete	edit	n/a	View Report	View Details	n/a

3 The Confirmation screen confirms that the report has been released for processing. Click Click here to return to the Work on Wage and Contribution Reports screen to release more reports.

CONFIRMATION

> (!) **Information**
>
> The report has been released for tonight's processing.

Click here to go to the previous page.

Reporting the new employee's wages

To begin reporting your new employee's wages, read employer reporting guide 9, *Reporting Wages for a Qualifying Employee* or 10, *Reporting for a Non-Qualifying Employee*.