

OREGON PERS

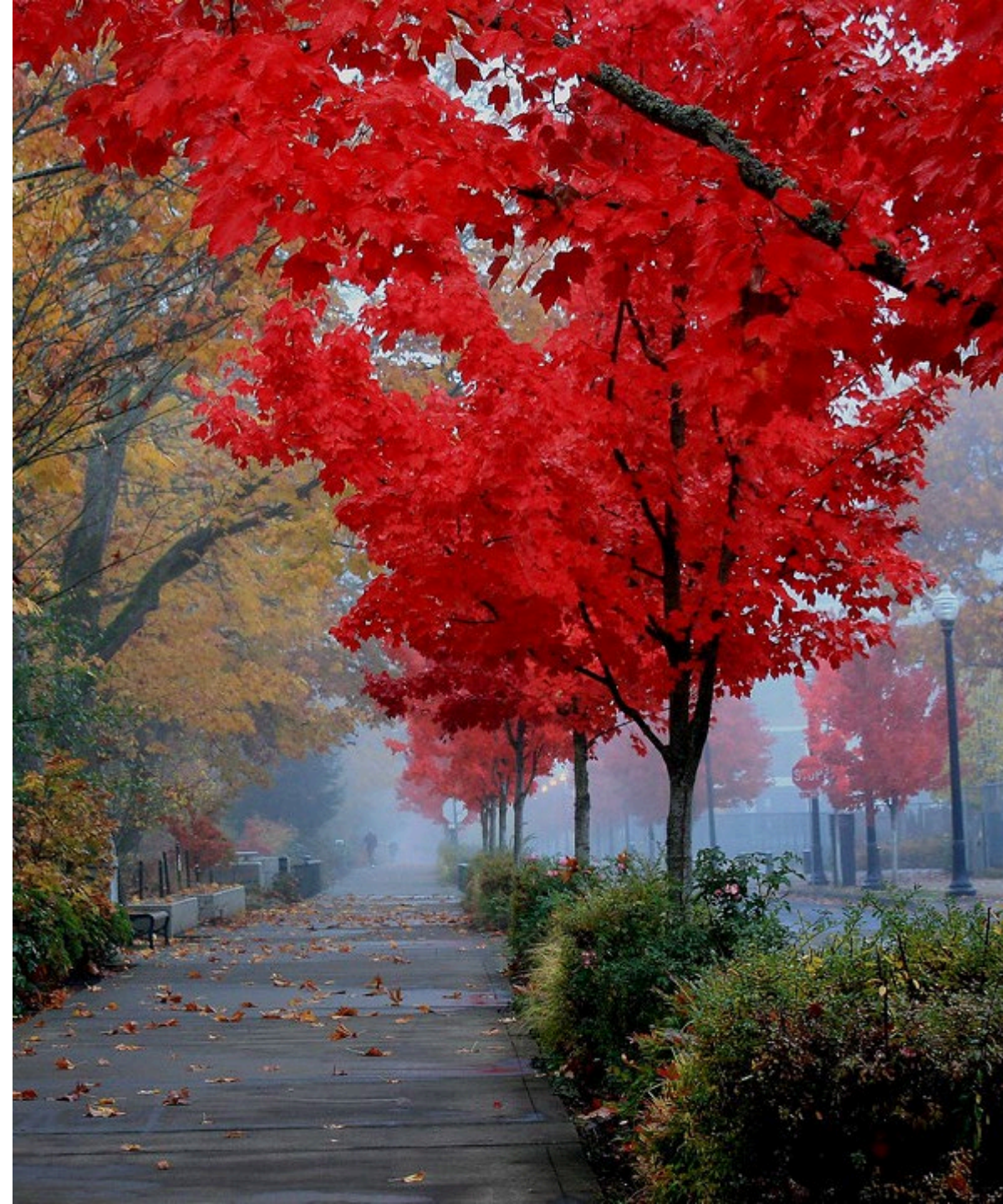
PUBLIC EMPLOYEES RETIREMENT SYSTEM



Paid Leave Oregon and PERS Reporting

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Agenda

- Paid Leave Oregon overview
- Reporting a leave
- Reporting Paid Leave Oregon payments
- Certifying service credit
- Reporting other payments
- Learn more
- Q&A

Paid Leave Oregon overview

Three plan types

How you report your employee's leave and leave benefits depends on the type of Paid Leave Oregon plan your organization has. There are three options:

1. State-run plan

The Paid Leave Oregon plan.

Payments are made by Oregon Employment Department.

Do report out on family leave (only if 11+ business days/calendar month).

Do not report payments to PERS.

2. Third party-run equivalent plan

A contracted plan, approved by Oregon Employment Department.

Payments are made by a third party (e.g., an insurance company).

Do report out on family leave (only if 11+ business days/calendar month).

Do not report payments to PERS.

Paid Leave Oregon overview

Three plan types

PERS only needs to know about payments paid directly by the employee's employer.

3. Employer-run equivalent plan

This is your organization's plan, approved by Oregon Employment Department. It provides benefits that are equal to or greater than the benefits Paid Leave Oregon provides.

Payments are made to employee directly from your organization.

Do not report family leave.

Do report payments to PERS.

Reporting a leave

- About leave without pay (LWOP)
- When to report
- How to report
- Types of leave
- Filling out the record

Reporting a leave

About leave without pay (LWOP)

LWOP is unpaid time away from work.

It does not include employer-paid time off including sick leave, vacation, bereavement, compensatory time, personal business, and holidays.

Pay from a third party (e.g., short-term disability, workers' compensation) does not count as a paid leave.

Employees do not earn service credit (aka retirement credit) for unpaid leave lasting 11 or more days in a month.

Reporting a leave

When to report

✓ Do report a leave to PERS that:

- Consists of **11 business days**/calendar month or more. Days do not need to be consecutive. Each occurrence is reported separately
- Is **unpaid**. NO payment from employer to employee of any kind (e.g., accrued sick leave, vacation time, or employer-run Paid Leave Oregon payments).

✗ Do not report a leave to PERS that:

- Consists of **10 or fewer business days** in a calendar month.
- Is **employer paid**. Do not report as a leave if employee receives any employer-paid leave that is provided as part of the employee's compensation and benefits (such as sick leave or vacation).

A **business day** is any day, Monday through Friday, when PERS is open for business. See [PERS office closures](#).

Reporting a leave

How to report

Submit a Detail 1 record for each segment of sequential business days.

Example: 12 sequential business days.

1	2	3	4	5	6	7
	LWOP	LWOP	LWOP	LWOP	LWOP	
8	9	10	11	12	13	14
	LWOP	LWOP	LWOP	LWOP	LWOP	
15	16	17	18	19	20	21
	LWOP	LWOP				
22	23	24	25	26	27	28
29	30	31				

Two Detail 1 records needed:

1. Start leave on 2nd.
2. Return from leave on 18th.

Example: 11 nonsequential business days.

1	2	3	4	5	6	7
	LWOP	LWOP	LWOP	LWOP		
8	9	10	11	12	13	14
			LWOP	LWOP	LWOP	
15	16	17	18	19	20	21
	LWOP	LWOP	LWOP	LWOP		
22	23	24	25	26	27	28
29	30	31				

Four Detail 1 records needed:

1. Start leave on 2nd.
2. Return from leave on 6th.
3. Start leave on 11th.
4. Return from leave on 20th.

Reporting a leave

How to report

For these examples, leave their status unchanged.

Example: 8 sequential business days.

1	2	3	4	5	6	7
	LWOP	LWOP	LWOP	LWOP	LWOP	
8	9	10	11	12	13	14
	LWOP	LWOP	LWOP			
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Do not report as a leave.

Example: 12 business days of paid accrued sick leave.

1	2	3	4	5	6	7
	SICK LEAVE	SICK LEAVE	SICK LEAVE	SICK LEAVE	SICK LEAVE	
8	9	10	11	12	13	14
	SICK LEAVE	SICK LEAVE	SICK LEAVE	SICK LEAVE	SICK LEAVE	
15	16	17	18	19	20	21
	SICK LEAVE	SICK LEAVE				
22	23	24	25	26	27	28
29	30	31				

Do not report as a leave.

Reporting a leave

Types of leave

Family leave.

- For pregnancy, caring for a new child or a sick family member, or recovering from a serious health condition.

Career development leave.

- For training or education.

Military leave.

- For active duty in the Uniformed Services.

Legislator leave.

- For a member of Legislature to attend legislative session.

Leave of absence.

- Leave taken for any other reason.

Seasonal

- For someone who has periodic (seasonal) employment with less than a year break between employment periods with the same employer.

EDX leave status codes.

00 - No Change in Status

00 - No Change in Status

01 - Qualifying New Hire

02 - Terminated

03 - On Family Leave

04 - On Career Development Leave

05 - On Military Leave

06 - On Legislator Leave

07 - On Leave of Absence

08 - Return from Leave

09 - Seasonal Leave of Absence

10 - Deceased

11 - Retiree New Hire with Hr Limit

12 - Retiree New Hire w/o Hr Limit

13 - New Hire - Retiree return to service

14 - Notice of Unit Election

15 - Non-Qualifying hire

Reporting a leave

Filling out the record

Submit a Detail 1 record:

- Status code: choose applicable code.
- Status date: first day of leave.

Upon return, submit another Detail 1 record:

- Status code 08 – Return From Leave.
- Status date: first day back at work.

ADD/EDIT A MEMBER RECORD

The status of this member record is: **Added**

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	<input type="text" value="*****"/>
Status Code	<input style="border: none; background-color: #f0f0f0; padding: 2px;" type="text" value="07 - On Leave of Absence"/>
Status Date	<input type="text" value="02/01/2023"/> <small>(MM/DD/YYYY)</small>
Last Day Service	<input type="text"/> <small>(MM/DD/YYYY)</small>
Old SSN	<input type="text"/>
First Name	<input type="text" value="Abdul"/>
Last Name	<input type="text" value="Employee"/>
Middle Name	<input type="text"/>
Name Change Indicator	<input type="text" value="N"/>
Address - 1	<input type="text"/>
Address - 2	<input type="text"/>
Address - 3	<input type="text"/>

Reporting Paid Leave Oregon payments

- How to report payments (employer-run equivalent plan *only*)

Reporting Paid Leave Oregon

How to report payments

Employer-run plan only

Submit Detail 2 wage records to report Paid Leave Oregon wages paid by your organization:

1. Fill in Hours Worked (Regular) field with equivalent number of hours.
2. Choose applicable wage code: 01 – Regular wages (for a qualifying position) or 02 – Regular/Non-Qualifying Wages (for a nonqualifying position).
3. Report wages as subject salary.
4. Include employee's 6% IAP contribution. (Note that you will be charged employer-rate contributions on that salary.)

If at the end of the calendar year the employee does not qualify for benefits, PERS will refund you the IAP and pension contributions you paid for that employee.

Reporting Paid Leave Oregon

How to report payments

Example

Joe Employee takes four weeks of Paid Leave Oregon leave.

His employer is a twice-monthly reporter. This is the first wage record submitted during his leave.

Paid Leave Oregon payments are 80% of Joe's salary, so reporter enters 80% of Joe's regular hours.

Joe's position is qualifying, so reporter includes IAP contribution.

DETAIL 2 - WAGE AND SERVICE	
SSN	*****
First Name	JOE
Last Name	EMPLOYEE
Pay Date	10/16/2023 <small>(MM/DD/YYYY)</small>
Work Period Begin Date	<input type="text"/> <small>(MM/DD/YYYY)</small>
Work Period End Date	<input type="text"/> <small>(MM/DD/YYYY)</small>
Hours Worked (Regular)	64
Hours Worked (Overtime)	<input type="text"/>
Reported Wage Code	01 - Regular wages
Subject Salary (Regular)	3360.00
Subject Salary (Overtime)	<input type="text"/>
Non-Subject Salary	<input type="text"/>
Lump Sum Payoff	<input type="text"/>

Paid Leave Oregon payments = 80% of regular salary.

Hours = 80% of regular hours.

Lump Sum Vacation Payoff	<input type="text"/>
Gross Salary	3360.00
Member Paid After-Tax Contribution (MPAT)	<input type="text"/>
Member Paid Pre-Tax Contribution (MPPT)	<input type="text"/>
Unit Contribution	<input type="text"/>
Employer Paid Pre-Tax Contribution (EPPT)	201.60
Optional Employer IAP Percentage	0% <input type="text"/>
Optional Employer IAP Contribution	<input type="text"/>
PERS Job Class Code	<input type="text"/>
Average Overtime Hours	<input type="text"/>
Employer Site Distribution Code	<input type="text"/>
Non PERS Data Memo	<input type="text"/>

Save

Cancel

Certifying service credit

- Earning service credit
- Submitting a DCR

Certifying service credit

Earning service credit

A month during which an employee is on leave for 11+ days and receiving no salary from employer does not earn service credit.

A month during which an employee is on leave for 11+ days and receiving any salary from employer, even a small amount per day, does earn service credit.

Employer-run Paid Leave Oregon plan

- ☑ Because the employee is receiving pay directly from the employer, the leave earns service credit.

Third-party run or state-run plan

- ☑ If employee is paid accrued leave directly from the employer on top of their Paid Leave Oregon payments, such as sick leave or vacation, the leave earns service credit.

If employee is using accrued leave and you are reporting fewer hours for them than normal, **submit a DCR**. Include comments explaining why employee is being paid fewer hours than normal.

Certifying service credit

Submitting a DCR

Submit a Demographic Correction Request (DCR)

- 1. In the Work List function, click [Create Demographic Correction Request \(DCR\)](#).

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**
- Request Information
- Eligibility Reports

BS BIG SCHOOL #1
Employer Number: 06000

WORK LIST Tell Me More

Below is a list of employees for which PERS is requesting Information. The Work Item Type indicates the type of information that is required. Please complete and return each Work Item. Click on the SSN to enter salary information.

[Create Demographic Correction Request \(DCR\)](#)

Click on the leftmost column to get the detail of the clicked record.

Prev 1 2 3 4 5 Next

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

Certifying service credit

Submitting a DCR

2. On the Demographic Correction Request screen, enter the SSN or PERS ID of the employee and click **Search**.

DEMOGRAPHIC CORRECTION REQUEST

SSN or PERS ID

 Search

Certifying service credit

Submitting a DCR

- 3. Click the button next to the family leave job segment.
- 4. Explain the leave and list the date range in the Comments box.
- 5. Click **Save**.

DEMOGRAPHIC CORRECTION REQUEST

SSN or PERS ID PETUNIA BLOOM

Start Date From 07/01/2003 To

Term/End Date From 06/29/2023 To Remove Term/End Date

Last Day Service From 06/28/2023 To

Job Class From School Employee To Start Date End Date

New Position Type Start Date End Date

Average OT Hours

Contract No. of Months

Hire Intent

Unused Sick Leave

Review Contribution Start Date

Delete Position

Comments Petunia is taking a Paid Leave Oregon leave from 10/5 - 11/5. She is using 2 hours/day of sick leave to supplement her pay.

Reporting other payments

- What wages to report
- Paid Leave Oregon + PTO
- Quick-reference chart

Reporting other payments

What wages to report

Only report wages paid by the employer during a leave. To report accrued leave, do not put employee on a leave of absence.

Do report wages paid by employer, such as:

- Holiday pay, sick leave, personal business.
- Uniform, equipment, or travel allowance.
- Employer gross-up (contact ESC for instructions).
- Employer-run Paid Leave Oregon payments.
- Other pay as listed in the [PERS payment categories chart](#).

Do not report wages paid by a third party, such as:

- Disability insurance.
- Workers' compensation.
- State-run or third-party run Paid Leave Oregon payments.

Reporting other payments

Paid Leave Oregon + paid time off (PTO)

If employer allows (or requires), employees can use paid time off (PTO) such as sick time, vacation, or any other paid leave in addition to their Paid Leave Oregon benefits. When employee uses PTO, report their status follows:

Reporting leave status

Do not report employee as on a leave.

For periods when employee is being paid any accrued leave such as sick leave, vacation, or compensatory time during their Paid Leave Oregon leave, **do not submit** a Detail 1 record with a Family Leave status.

- *If they are still on leave after PTO runs out and leave will last another 11+ business days, you can then report employee as on family leave.*

Reporting other payments

Paid Leave Oregon + paid time off (PTO)

When employee uses PTO, report their pay as follows:

Reporting PTO + Paid Leave Oregon pay

Do report PTO pay.

On a Detail 2 wage record, use wage code 01 – Regular Wages. If employee is receiving PTO in addition to Paid Leave Oregon payments from employer-run program, add PTO + Paid Leave Oregon payments together.

Report the hours of PTO and equivalent Paid Leave Oregon hours for each pay period in the Hours Worked (Regular) field.

Report the pay in the Subject Salary (Regular) field.

Include the employee's 6% IAP contribution.

Reporting other payments

Quick reference chart

Source of payments received while on family leave	Report payments to PERS?	Report leave to PERS?
State-run Paid Leave Oregon program	No.	Yes. 03 – On Family Leave.
Third party-run Paid Leave Oregon program	No.	Yes. 03 – On Family Leave.
Employer-run program	Yes. Applicable wage code and equivalent hours.	No.
Sick leave, vacation, comp time, or other accrued paid time off	Yes. Applicable wage code and equivalent hours.	No.
Employer gross-up in addition to Paid Leave Oregon pay	Yes. Contact ESC.	Yes. Contact ESC.

Learn more

Employer resources

Employer reporting guide [11, Reporting a Leave](#).

Employer reporting guide [13, Family and Medical Leave](#).

Employer quick-reference guide, [“EDX Status Codes.”](#)



Questions & answers

Q&A

Questions?



OREGON PERS

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THANK YOU

