Guide to Reporting Salary

PERA prohibits recording and distribution of this presentation.

Today's Program

- Reporting Basics
- SDR Walk-Through
- EFT Payment
- After Payment

Welcome to PERA

PERA is a Pension

a retirement plan paid into while working that provides future monthly lifetime income

PERA

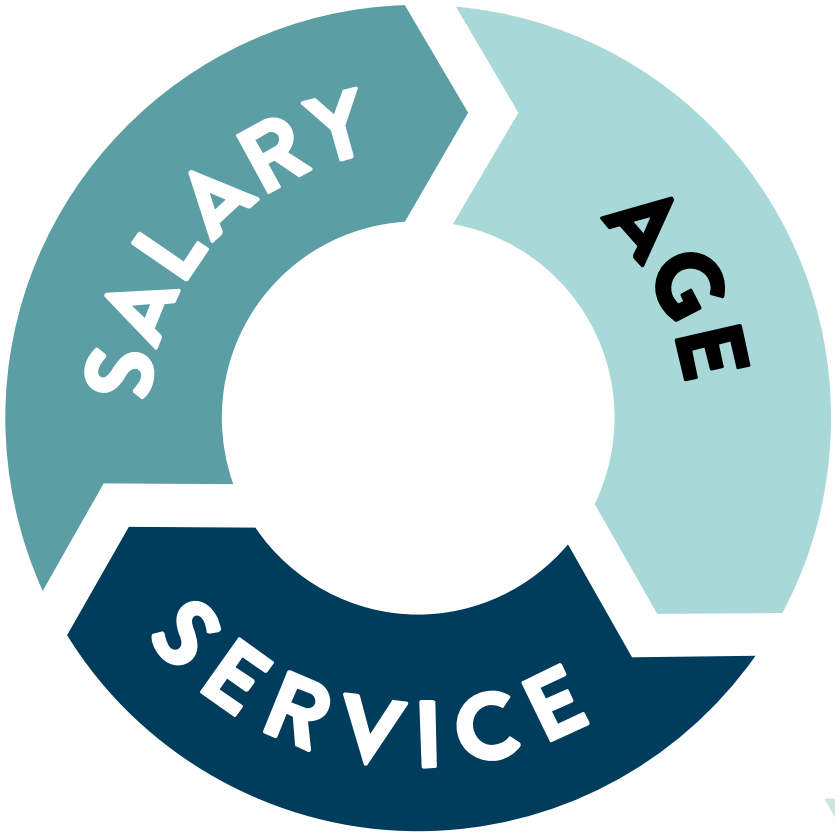
Paycheck Deductions

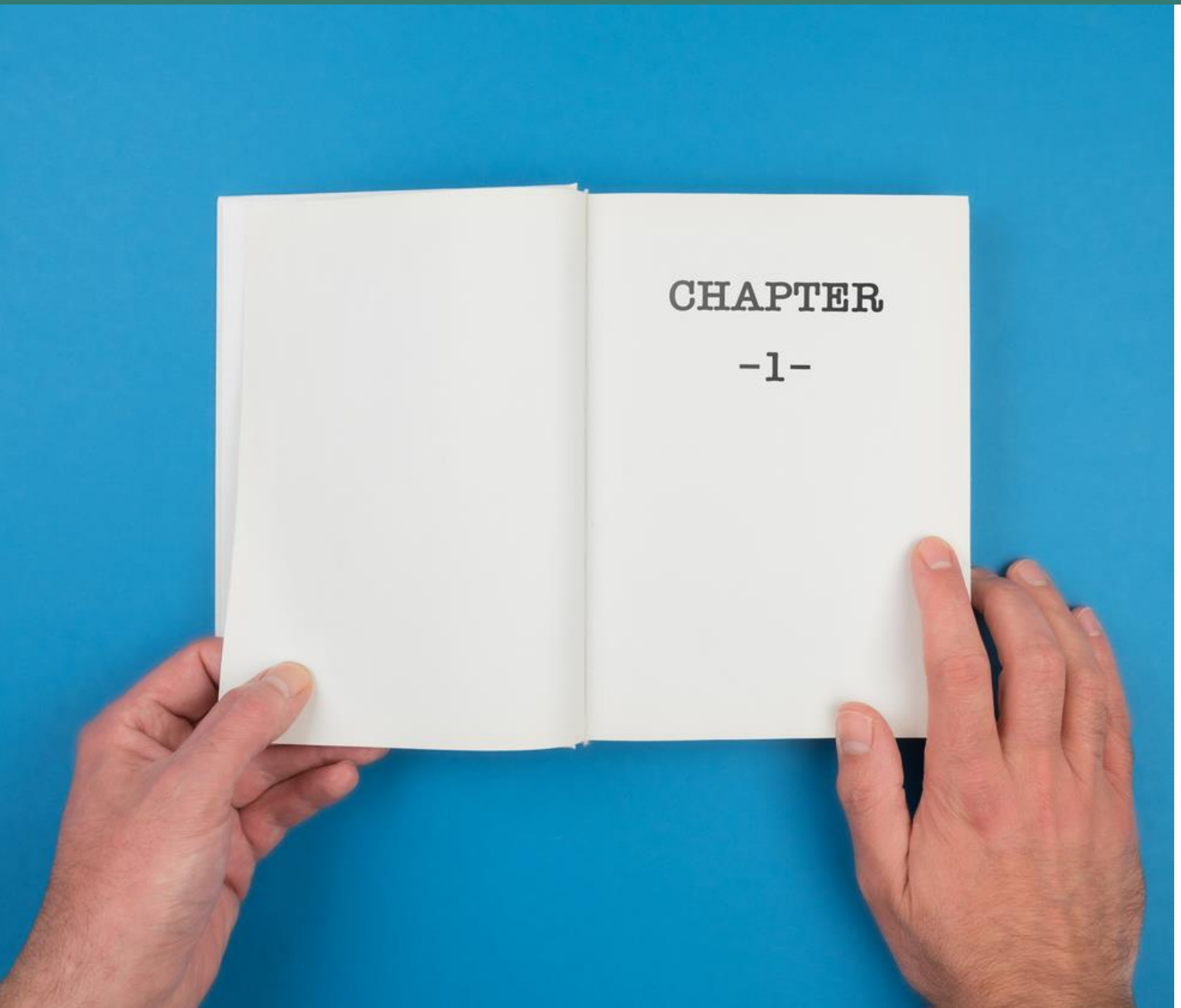
	Employee Contributions	Employer Contributions
Coordinated Plan	6.50%	7.50%
Police & Fire Plan	11.80%	17.70%
Correctional Plan	5.83%	8.75%

Pension Formula

Calculated on Three Factors

- Average Monthly Salary
- Years of Service
- Age





Intro to Reporting

Salary Deduction Report

The Salary Deduction Report (SDR) collects members' payroll data each pay period:

- PERA-eligible earnings and pay type
- Coverage dates
- Member and employer contributions

SDR is due 14 calendar days after pay date

PERA-eligible Salary

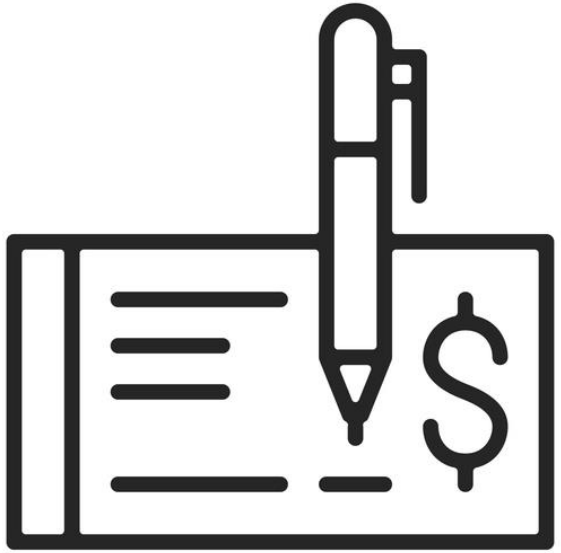
Only report PERA-eligible earnings on the SDR:

- Gross, pre-tax salary
- Overtime/retroactive pay
- PTO (used)
- Performance-based bonus

- Expense reimbursements
- Retirement incentives
- Payment for unused PTO
- Other bonus payment

Pay Type 01 – Regular Pay

- Salary or compensation earned by and paid to an employee in the current pay period
- Includes wages, overtime, and paid days off
- Only pay type members receive service credit for (one per month, up to 12 per year)



Pay Types 02 and 05

Pay Type 02 – Lump-Sum Compensatory Pay

- Lump-sum payments of unused, accrued, or banked compensatory hours or holiday time earned during a prior pay period

Pay Type 05 – Retroactive Pay

- Wages or earnings paid to an employee for services performed during prior pay periods

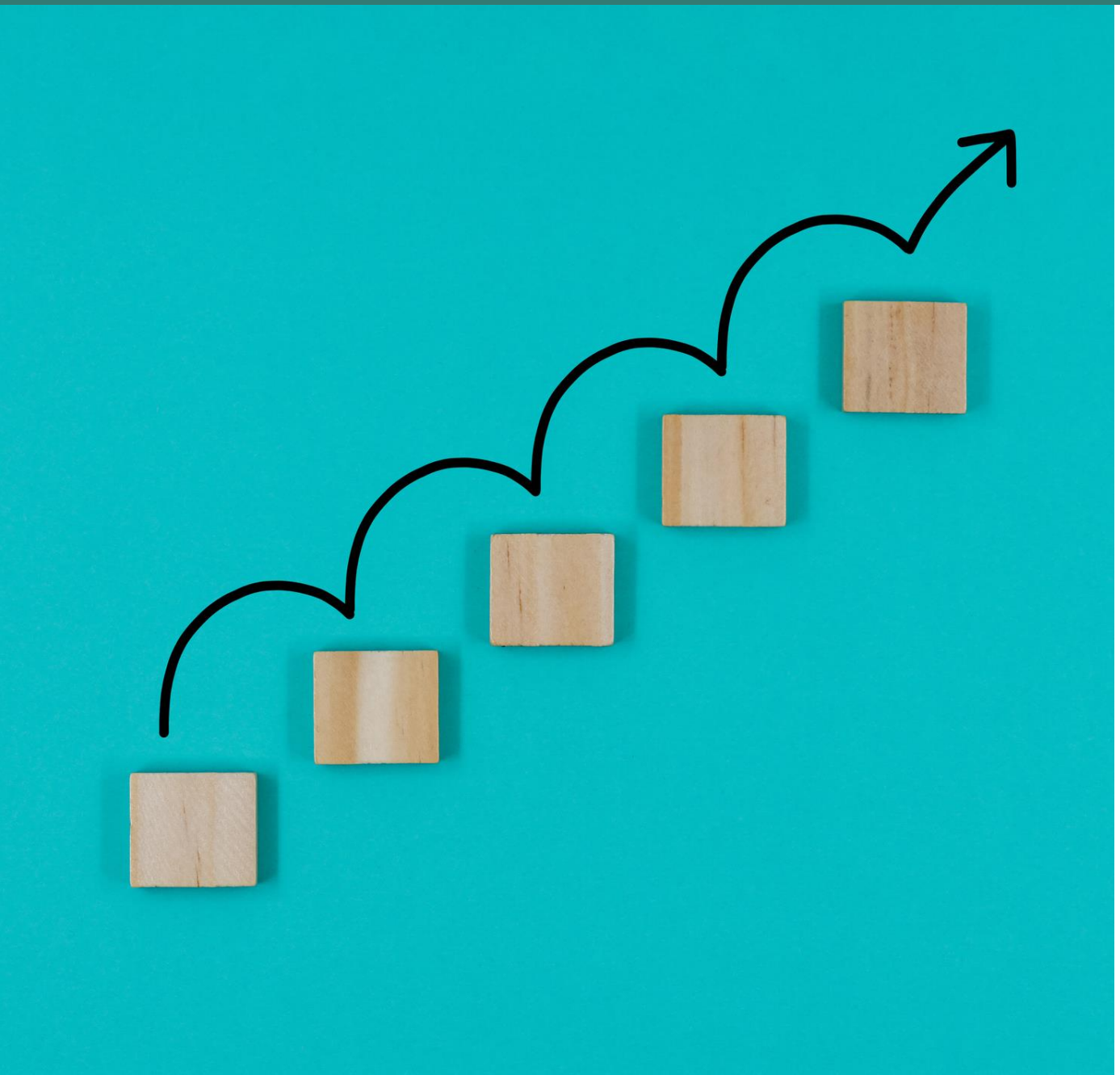
Report the coverage dates in which the pay/banked hours were **earned**

Coverage Dates

Report the dates in which salary is earned

- Retroactive/lump-sum pay
- Off-cycle checks
- Overtime from a previous pay period

PERA



SDR Walk-Through

Reporting Methods

Direct data entry

- Input data directly
- System validates data
- Can save and print a copy of data entered

Computer file upload

- Internal or contracted programmers
- Chapter 9 - File Format
- Contact PERA for testing

HOME

MEMBER ACCOUNT

SEARCH

Employee

Benefit Recipient

ENROLL MEMBER

New Enrollment

MAINTAIN EMPLOYER

Employer Contacts

TRANSMIT FILE

TRANSMIT TEST FILE

CHANGE PASSWORD

SDR REPORTING

New SDR

SDR History

SDR Summary Report

PENDING REPORTS

No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered.
If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click here.

For the ERIS Glossary, click here.

HOME
MEMBER ACCOUNT
SEARCH
Employee
Benefit Recipient
ENROLL MEMBER
New Enrollment
MAINTAIN EMPLOYER
Employer Contacts
TRANSMIT FILE
TRANSMIT TEST FILE
CHANGE PASSWORD
SDR REPORTING
New SDR
SDR History
SDR Summary Report
PENDING REPORTS
No Reports

New SDR

Use the Fields below to create your Salary Deduction Report

Pay Schedule Semi-Monthly

Payroll Calendar Regular / Supplement

Plan All Plans

Paid Date

Begin Date

All Plans
DBP Only
DCP Only
Exempt Only
Blank (No Members)

End Date mm/dd/yyyy

Pay Type Regular

Sort Option Alpha by Plan

Submit Reset

Completing the SDR

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Regular
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	Review Level
☐	XXXXX8112	ADAMS, ANNIE	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX5902	BAKER, BOB	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX9462	BROOKS, BENJAMIN	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX9310	HIGGINS, HANK	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX1134	JOHNSON, JOE	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	

Completing the SDR

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Regular
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

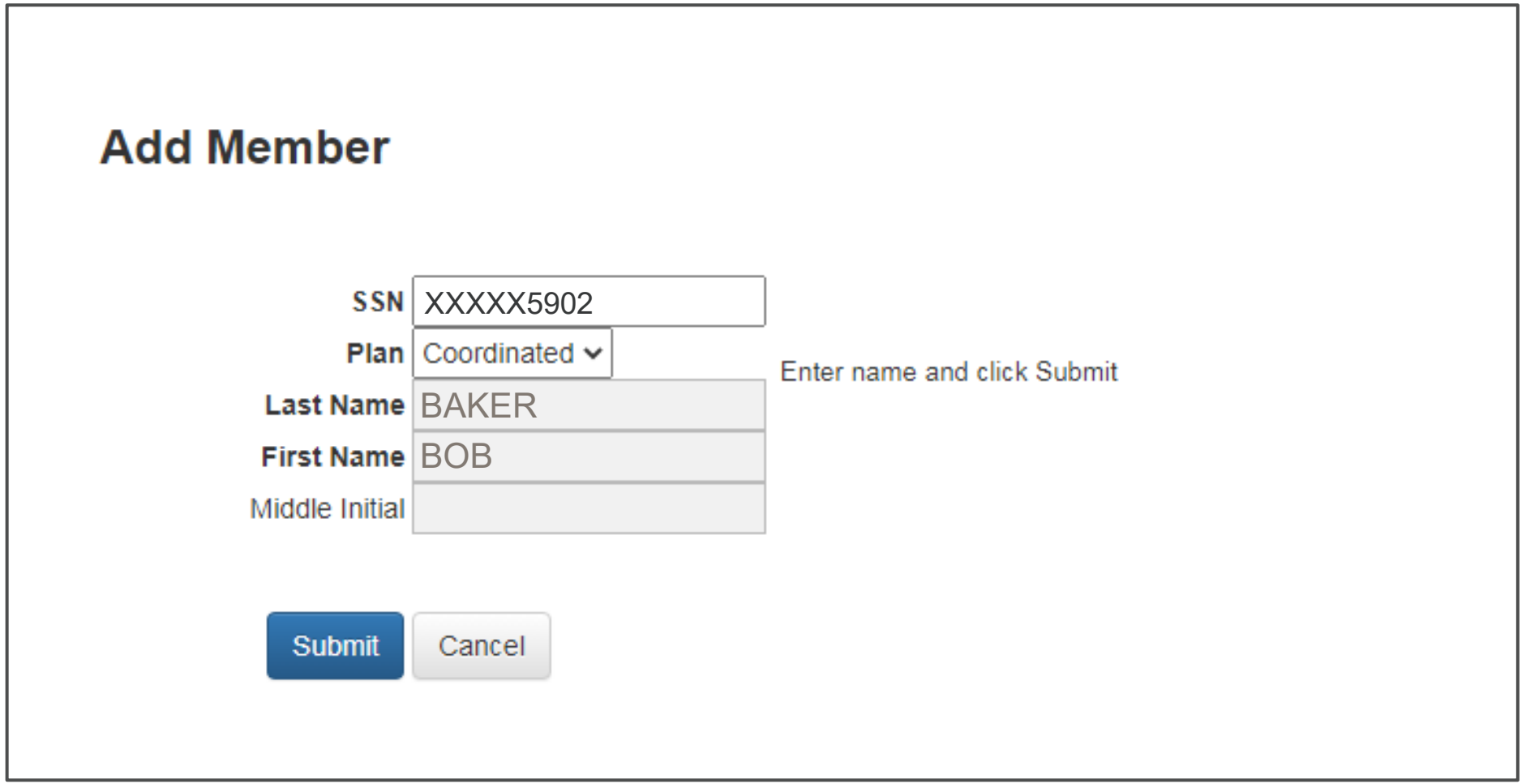
Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	Review Level
☐	XXXXX8112	ADAMS, ANNIE	CORD	REG	1300.25	0.00	84.52	12/01/2024	12/14/2024	
☐	XXXXX5902	BAKER, BOB	CORD	REG	1500.02	0.00	97.50	12/01/2024	12/14/2024	
☐	XXXXX9462	BROOKS, BENJAMIN	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX9310	HIGGINS, HANK	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX1134	JOHNSON, JOE	CORD	REG	0.00	0.00	0.00	12/01/2024	12/14/2024	

Completing the SDR

Completing the SDR



Completing the SDR

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Regular
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	Review Level
☐	XXXXX8112	ADAMS, ANNIE	CORD	REG	1300.25	0.00	84.52	12/01/2024	12/14/2024	
☐	XXXXX5902	BAKER, BOB	CORD	REG	1500.02	0.00	97.50	12/01/2024	12/14/2024	
☐	XXXXX5902	BAKER, BOB	CORD	RETRO	230.10	0.00	14.96	11/03/2024	11/16/2024	
☐	XXXXX9462	BROOKS, BENJAMIN	CORD		0.00	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX9310	HIGGINS, HANK	CORD		0.00	0.00	0.00	12/01/2024	12/14/2024	

COMP
GRIEV
RETRO
OD

Submit to PERA

Pay Schedule	Bi-Weekly
Pay Calendar	Regular
Pay Period	12/01/2024 through 12/14/2024
SDR Status	New
Paid Date	12/18/2024

Submit to PERA | Delete SDR | Print | Save | Close

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Contribution Summary

Contribution Summary will use the System Total amounts unless you enter a remitted amount.

Coordinated	Member Earnings	Member Deductions	Employer Contribution	Employer Additional	Plan Totals	Review Level
System Totals	20,000.00	1,300.00	1,300.00	200.00		
Remitted		1,300.00	1,300.00	200.00	2,800.00	

SDR Remittance Summary - All Plans

	Member Deductions	Employer Contributions	Sub Total
System Total	1,300.00	1,500.00	2,800.00

Invoice Summary

There are no Invoices.

Grand Total 2,800.00

PERA

Saved not Submitted

- HOME
- MEMBER ACCOUNT
- SEARCH
  - Employee
  - Benefit Recipient
- ENROLL MEMBER
  - New Enrollment
- MAINTAIN EMPLOYER
  - Employer Contacts
- TRANSMIT FILE
- TRANSMIT TEST FILE
- CHANGE PASSWORD
- SDR REPORTING
  - New SDR
  - SDR History
  - SDR Summary Report
- PENDING REPORTS
  - No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered.
If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click here.

For the ERIS Glossary, click here.

PERA

Saved not Submitted

- HOME
- MEMBER ACCOUNT
- SEARCH
  - Employee
  - Benefit Recipient
- ENROLL MEMBER
  - New Enrollment
- MAINTAIN EMPLOYER
  - Employer Contacts
- TRANSMIT FILE
- TRANSMIT TEST FILE
- CHANGE PASSWORD
- SDR REPORTING
  - New SDR
  - SDR History
  - SDR Summary Report
- PENDING REPORTS
  - No Reports

SDR History Search

Use the fields below to view a listing of Salary Deduction Reports of your agency that have been saved and/or submitted to PERA.

SDR Status: All

Pay Schedule: -- No Selection --

Paid From Date: mm/dd/yyyy

Paid To Date: mm/dd/yyyy

Search

Reset

Search Results: 224 Records Found

Received Date	SDR Status	Paid Date	Begin Date	End Date	SDR Total	Pay Schedule	SDR ID
	Saved Not Submitted	12/18/2024	12/01/2024	12/14/2024	$0.00	Bi-Weekly	
12/09/2024	Posted	12/04/2024	11/17/2024	11/30/2024	$3,089,012.50	Bi-Weekly	1628187
11/26/2024	Posted	11/20/2024	11/03/2024	11/16/2024	$3,109,442.00	Bi-Weekly	1620012
11/08/2024	Posted	11/06/2024	10/20/2024	11/02/2024	$2,782,753.75	Bi-Weekly	1617719
10/29/2024	Posted	10/23/2024	10/06/2024	10/19/2024	$3,002,034.25	Bi-Weekly	1610425

Exempt Plan (99)

- For employees who are excluded due to being a PERA annuitant, but who still need to be reported on the SDR due to earnings or hours limits
  - PERA annuitants under the full Social Security retirement age (67)
  - Employees working under a Phased Retirement Option (PRO)

Reporting Wages of PERA Annuitants

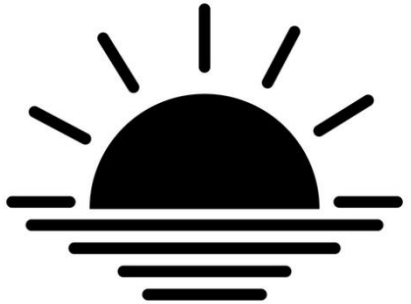
PERA Annuitants under the full Social Security retirement age (67):

- Enroll in PERA's Exempt Plan (99)
- Report wages, but don't deduct or submit contributions
- Wages no longer need to be reported once employee reaches age 67

Reporting Wages of PRO Employees

Reporting Wages of Phased Retirement Option (PRO) Employees

- Report wages and hours, including PTO
- If employee has no wages/hours for a payroll period, report "0" in the earnings/hours worked fields of the SDR
- Don’t deduct or submit contributions



Exempt SDR

- HOME
- MEMBER ACCOUNT
- SEARCH
  - Employee
  - Benefit Recipient
- ENROLL MEMBER
  - New Enrollment
- MAINTAIN EMPLOYER
  - Employer Contacts
- TRANSMIT FILE
- TRANSMIT TEST FILE
- CHANGE PASSWORD
- SDR REPORTING
  - New SDR
  - SDR History
  - SDR Summary Report
- PENDING REPORTS
  - No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered.
If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click here.

For the ERIS Glossary, click here.

HOME
MEMBER ACCOUNT
SEARCH
Employee
Benefit Recipient
ENROLL MEMBER
New Enrollment
MAINTAIN EMPLOYER
Employer Contacts
TRANSMIT FILE
TRANSMIT TEST FILE
CHANGE PASSWORD
SDR REPORTING
New SDR
SDR History
SDR Summary Report
PENDING REPORTS
No Reports

New SDR

Use the Fields below to create your Salary Deduction Report

Pay Schedule Semi-Monthly

Payroll Calendar (•) Regular ( ) Supplement

Plan All Plans

- All Plans
- DBP Only
- DCP Only
- Exempt Only
- Blank (No Members)

Paid Date

Begin Date

End Date mm/dd/yyyy

Pay Type Regular

Sort Option Alpha by Plan

Submit Reset

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Regular
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Hours Worked	Begin Date	End Date	Review Level
☐	XXXXX8112	AMOS, AUSTIN	EXMT	REG	510.97	0.00	12/01/2024	12/14/2024	
☐	XXXXX5902	BURNS, BELINDA PRO	EXMT	REG	722.45	30.50	12/01/2024	12/14/2024	
☐	XXXXX9462	CHANG, CHARLIE PRO	EXMT	REG	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX9310	DAVIES, DONALD	EXMT	REG	0.00	0.00	12/01/2024	12/14/2024	
☐	XXXXX1134	ELLIS, EMMA	EXMT	REG	0.00	0.00	12/01/2024	12/14/2024	

Transmit File

HOME
MEMBER ACCOUNT
SEARCH
Employee
Benefit Recipient
ENROLL MEMBER
New Enrollment
MAINTAIN EMPLOYER
Employer Contacts
TRANSMIT FILE
TRANSMIT TEST FILE
CHANGE PASSWORD
SDR REPORTING
New SDR
SDR History
SDR Summary Report
PENDING REPORTS
No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered.
If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click here.

For the ERIS Glossary, click here.

HOME

MEMBER ACCOUNT

SEARCH

Employee

Benefit Recipient

ENROLL MEMBER

New Enrollment

MAINTAIN EMPLOYER

Employer Contacts

TRANSMIT FILE

TRANSMIT TEST FILE

CHANGE PASSWORD

SDR REPORTING

New SDR

SDR History

SDR Summary Report

PENDING REPORTS

No Reports

Transmit File

Select the file you wish to submit to PERA or Transmit Test File

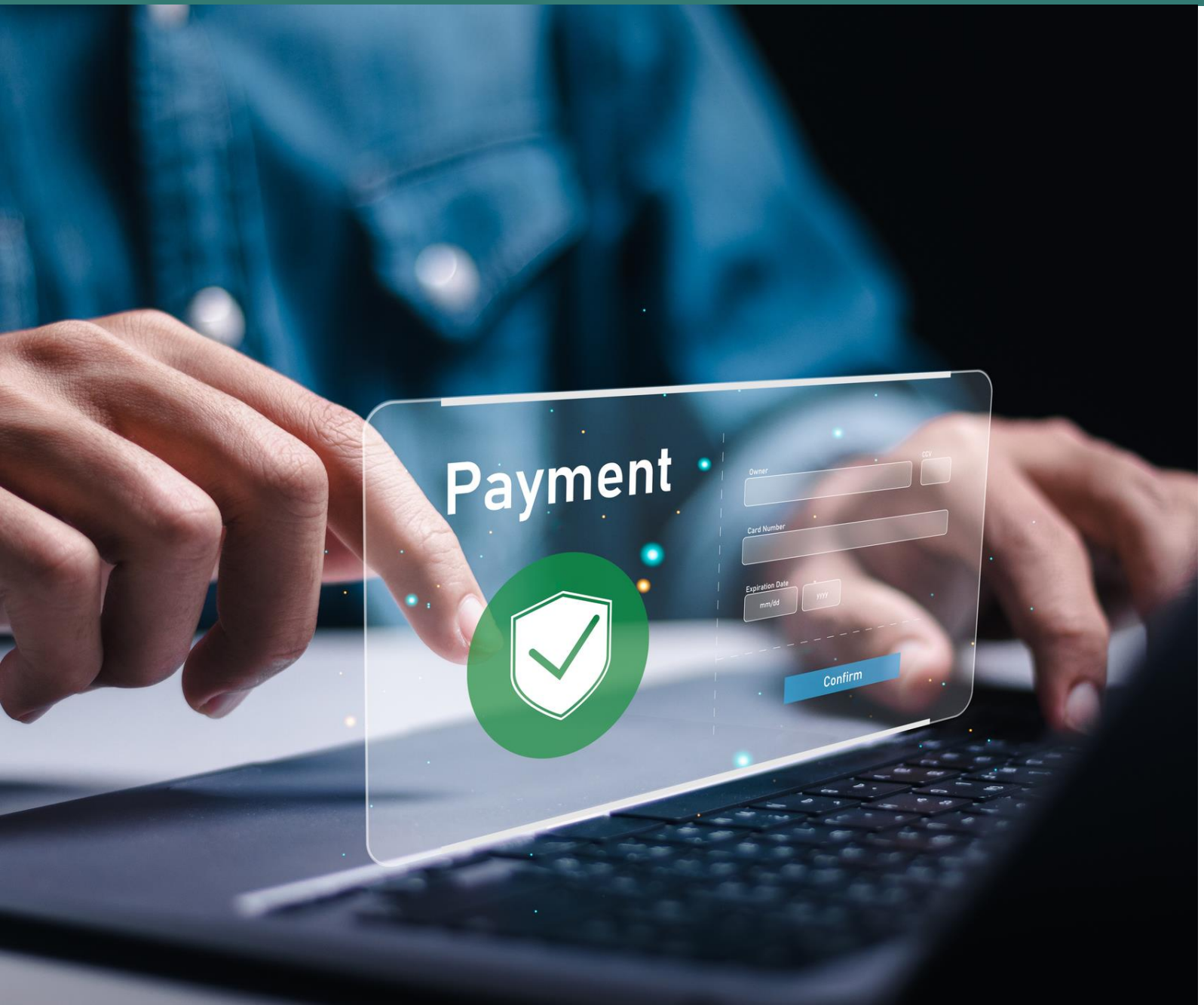
Type of File : SDR or Demographic File - File must contain suffix .sdr in approved File Format

Misc. File - Used for voluntary leave purchase data only

Choose File SALARY_DEDUCTION_REPORT.sdr

Submit

Note to Mac Users: Please use Safari or Firefox web browsers when sending files on this page. You will need to log out and log in with the recommended browsers.



Making a Payment

UBLIC EMPLOYEES
ETIREMENT ASSOCIATION

ELIGIBILITY REPORTING RESOURCES SOCIAL SECURITY SVF

come, PERA Em

nployers now have a new home.

RTED

ers

BILITY REPORTING RESOURCES

- Reporting Dashboard
- Plan Rates
- Salary Reporting
- Enrollment
- Status Changes
- PERA Employer Reports
- Make a Payment

I'm here to...

Reporting Dashboard

REPORTING

REPORTING DASHBOARD

PLAN RATES

SALARY REPORTING

ENROLLMENT

STATUS CHANGES

What is my Role as an Employer?

From an employee's first enrollment to the date they leave public service and apply for benefits, th
you provide to PERA helps our members plan for and achieve a secure financial future.

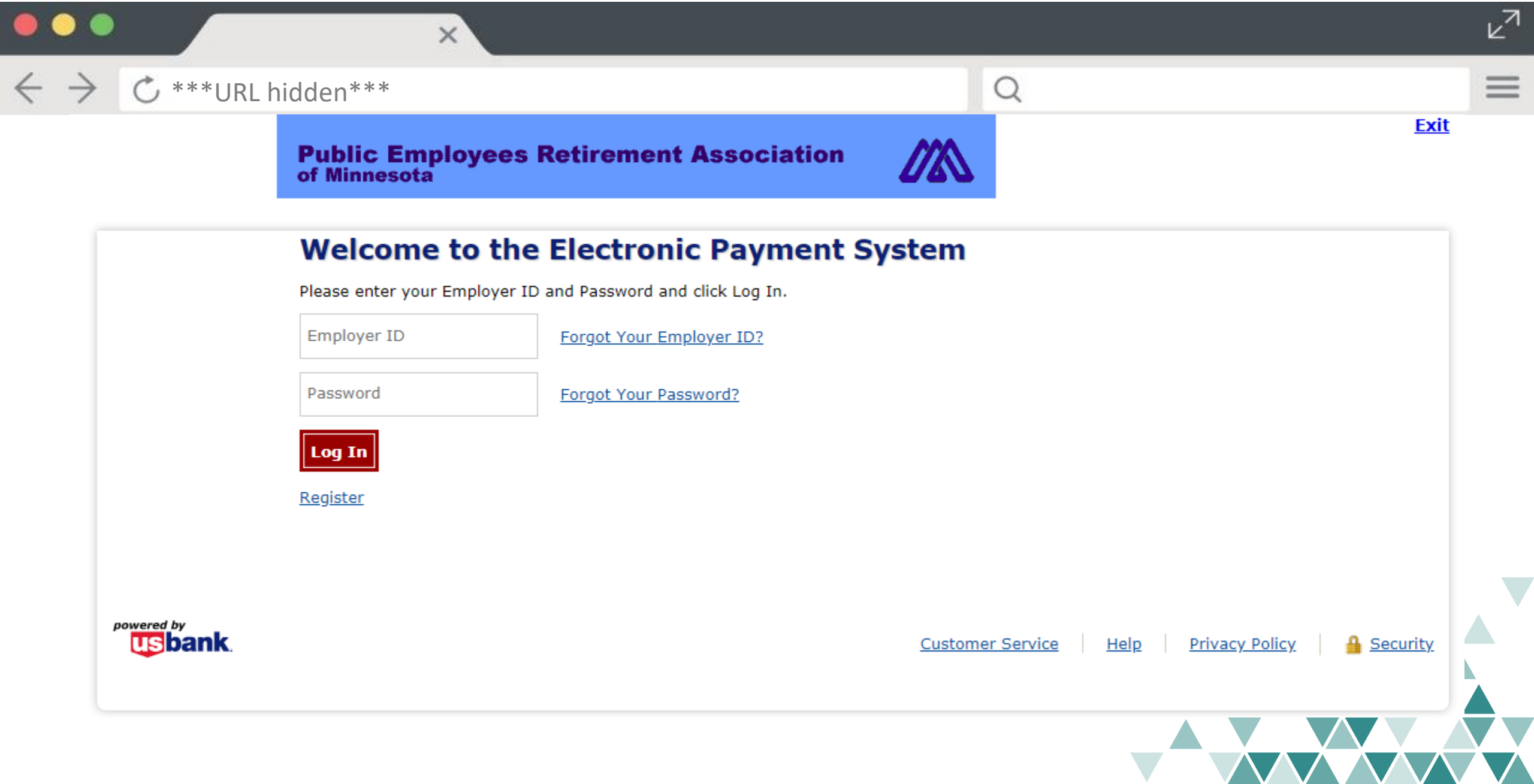
This flow of information is most effective when you keep PERA up to date on all contact data for y

Make a Payment

Making contribution payments using Electronic Funds Transfer (EFT) is simple and secure. Through the two EFT methods available you can quickly move funds from your bank account to PERA's bank.

MAKE PAYMENT

EFT Payment


URL hidden
Exit
Public Employees Retirement Association
of Minnesota
Welcome to the Electronic Payment System
Please enter your Employer ID and Password and click Log In.
Employer ID
Forgot Your Employer ID?
Password
Forgot Your Password?
Log In
Register
powered by usbank
Customer Service
Help
Privacy Policy
Security

Three Types of Invoices

Invoice	Reason
Delinquency	
Shortage	
Omitted Deduction	

Credit Memo

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Contribution Summary

Contribution Summary will use the System Total amounts unless you enter a remitted amount.

Coordinated	Member Earnings	Member Deductions	Employer Contribution	Employer Additional	Plan Totals	Review Level
System Totals	20,000.00	1,300.00	1,300.00	200.00		
Remitted		1,300.00	1,300.00	200.00	2,800.00	

SDR Remittance Summary - All Plans

	Member Deductions	Employer Contributions	Sub Total
System Total	1,300.00	1,500.00	2,800.00

Invoice Summary

History of Outstanding Invoices

Invoice No.	Description	Invoice Amount	Amount Paid or Credit Taken
170081	Credit Memo	51.25	0.00
170099	Credit Memo	46.75	0.00
170225	Credit Memo	100.17	0.00
		Total Amount Paid	0.00

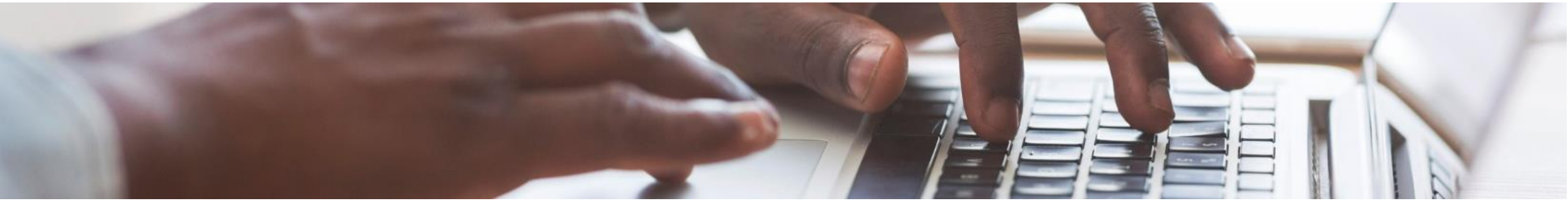
Grand Total 2,702.00

Using a Credit Memo

MN PERA Payment

PERA Employer ID Number	
Payroll Paid Date (MMDDYYYY)	
Invoice/Credit Memo Number 1	170081
Invoice/Credit Memo Amount 1	5125
Invoice/Credit Memo Number 2	170099
Invoice/Credit Memo Amount 2	4675

After Payment



SDR matched with payment data

System flags discrepancies

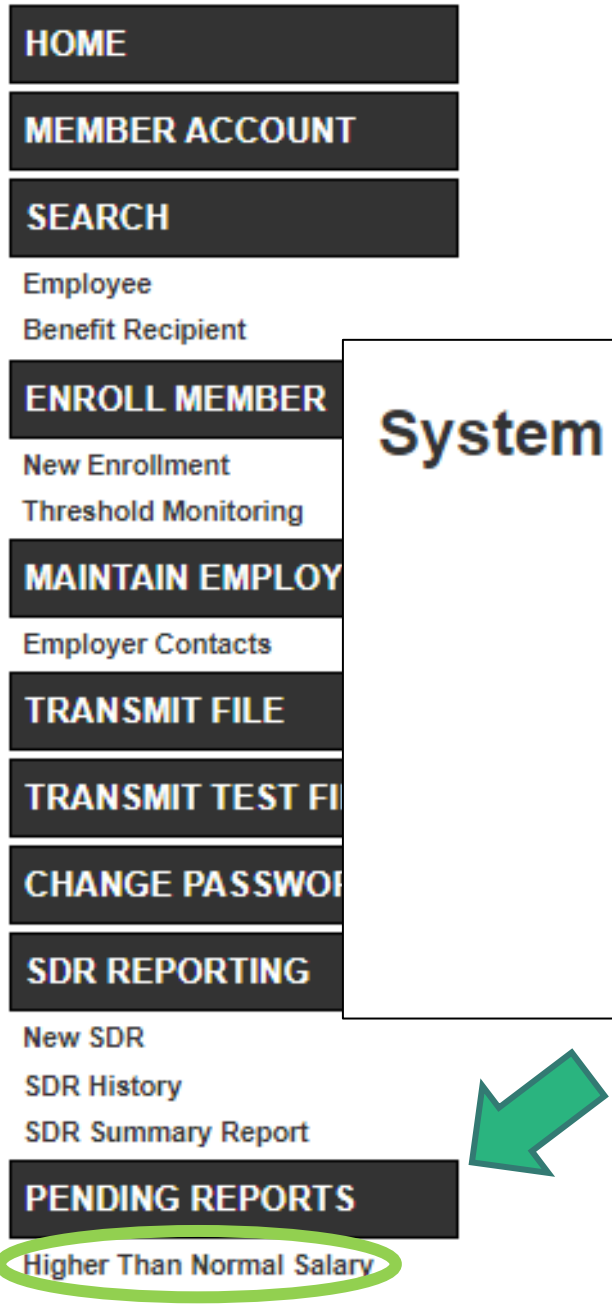
Transactions are posted to account

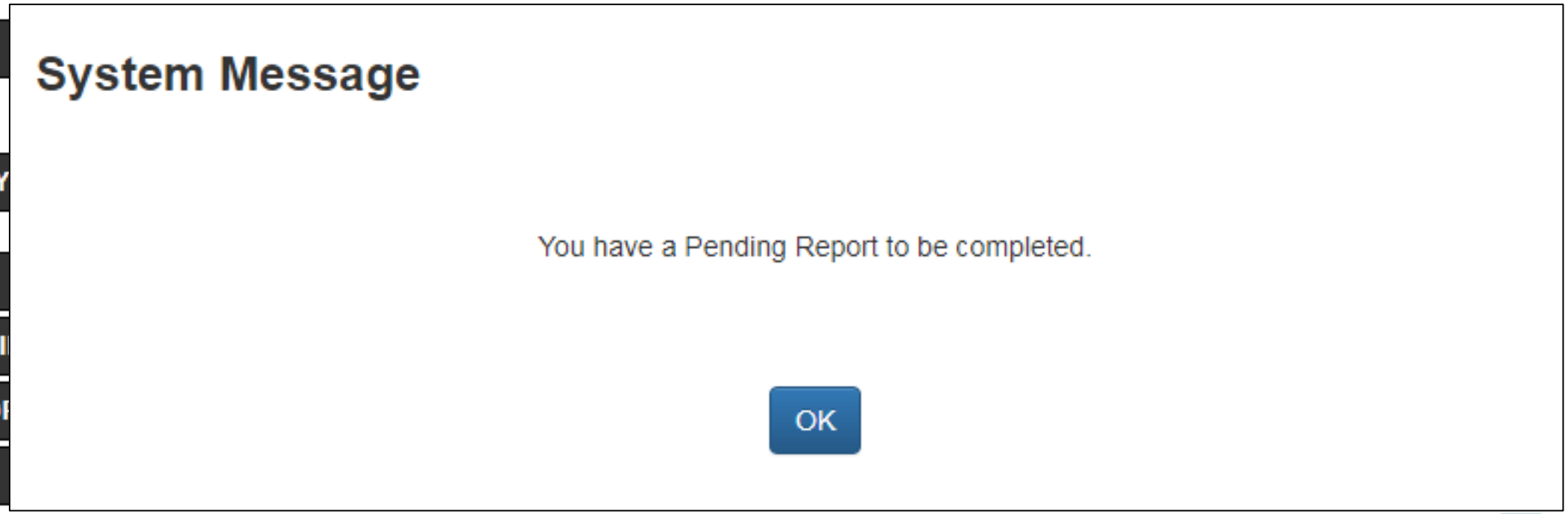
Pending Reports

What are Pending Reports?

- Automated reports generated by ERIS
- Annual and follow-up reports
- Collect missing data or validate data due to errors/discrepancies

Pending Reports





Higher than Normal Salary

Higher Than Normal Salary

SSN	Name	Plan	Paid Date	Begin Date	End Date	Earnings
XXX-XX-0340	DOE, JOHN	Coordinated	12/17/2024	12/01/2024	12/14/2024	$1,250.00

Select **one of the explanations below** for increased earnings and "Submit."

- ○ Overtime/Increased Hours (One time occurrence)
- ○ Overtime/Increased Hours, New Position or Pay Raise (On going occurrence)
- ○ Includes Wages/Coaching Lump Sum, Retroactive Pay, Compensatory Pay or Contract/Summer Pay Out from a different period
- ○ Includes Unused Sick or Vacation Pay
- ✓ None of the above. Explanation Required

Submit Cancel

PRO Reports

PRO Hours

- Generates when the most recent SDR is missing hours or wages for one or more PRO employees

PRO Status

- Generates when a **specific** PRO employee's earnings haven't been reported in the last 30 days

Blank SDR

HOME
MEMBER ACCOUNT
SEARCH
Employee
Benefit Recipient
ENROLL MEMBER
New Enrollment
MAINTAIN EMPLOYER
Employer Contacts
TRANSMIT FILE
TRANSMIT TEST FILE
CHANGE PASSWORD
SDR REPORTING
New SDR
SDR History
SDR Summary Report
PENDING REPORTS
No Reports

New SDR

Use the Fields below to create your Salary Deduction Report

Pay Schedule Semi-Monthly

Payroll Calendar Regular / Supplement

Plan All Plans

All Plans
DBP Only
DCP Only
Exempt Only
Blank (No Members)

Paid Date

Begin Date

End Date mm/dd/yyyy

Pay Type Regular

Sort Option Alpha by Plan

Submit Reset

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Supplemental
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	Review Level

Save

Adjustments

Salary Deduction Report

Pay Schedule Bi-Weekly
Pay Calendar Supplemental
Pay Period 12/01/2024 through 12/14/2024
SDR Status New
Paid Date 12/18/2024

Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	Review Level
☐	XXXXX1279	KING, KELLY	CORD	REG	0.00	0.00	65.00	12/01/2024	12/14/2024	

Save

Recap

- Reporting basics
- SDR walk-through
- EFT payment
- Follow-up reports

PERA is governed by Minnesota Statutes; especially chapters 11A, 353, 353A, 353D, 353E, 353F, 353G, 356 and 356A.

Changes to PERA's plans, including benefit provisions and contribution rates, are made through the introduction and passage of legislation by the Minnesota Legislature.

Disclaimer

Disclaimer:

Our programs are intended to provide general information; the rights and obligations of PERA members are governed by state and federal laws, rules, and regulations. The Minnesota Legislature or the federal government may change the statutes, rules, and regulations governing PERA at any time. If there is a discrepancy between the law governing PERA and the information contained in this presentation, the statutes and regulations will govern.

Wrap-up and questions

www.mnpera.org
employer.reps@mnpera.org
651.296.3636
1.888.892.7372
Select **option 2** for questions