

## PAS Updates



### Pension Administration System

Our school reporting team is getting ready to move into phase 3 of the User Acceptance Testing (UAT) this September. We would like to extend a sincere thank you to our Local Administration Unit (LAU) volunteers for completing phase 1 of testing. Participants tested five core tasks and provided invaluable feedback, confirming the functionality of each as a success. We anticipate the second round of testing for our volunteer LAUs early this Fall and will continue to share updates as we progress.

## LAU Help

### What questions can we answer for you?

The ERB school reporting team will host webinars for all LAU Employer reporting groups on the first Tuesday of the second month of each quarter. Our goal is to provide essential information and support for all HR and Payroll teams across our LAUs. Following the great turnout for our last session on adjustments and the new Form 9, we want to keep that momentum going! What topics would you like to see covered next?

Please let the school reporting team know by emailing your thoughts, questions, and feedback to the [la.help@erb.nm.gov](mailto:la.help@erb.nm.gov).



# Important Things to Know

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## Employee Data Forms (EDF)

Employee Data Forms (EDFs) are required documents completed by the employee and reviewed by HR. Accuracy is essential to ensure proper reporting.

### Completion Guidelines

- Please print clearly with blue or black ink
- The top section needs to be completed in its entirety; including SSN, DOB, address, email, phone number. If critical information is missing, a new EDF will be requested
- **Only report the employees' actual, verified SSN. Never use "placeholder" numbers (00000000 or 99999999) If you do not have the correct SSN, wait to report the member**
- Check the "New Hire" box only if the employee has never worked for an ERB contributing LAU.
- The "Rehire" box for employees who have worked for a LAU at some point in their work history.
- Employees must indicate if they are currently working for another LAU; full-time, part-time, or are ARP (College or University).
- Employees need to include the name of the LAU they are currently working for.
- **Retired members may return to work for an LAU only after completing any required layoff periods, applying for the Return-To \_work program and receiving formal approval from ERB. While the application process is the retiree's responsibility, the employer must verify eligibility by obtaining a copy of approval letter before retiree begins work.**
- PERA Retirees can be verified through calling ERB or by calling PERA directly.
- The employee certification must be completed and signed by an authorized signer listed on the contact sheet. If it is unsigned or signed by an unauthorized individual, a new form will be required.

### When to submit EDFs:

- An EDF must be submitted upon hire or rehire
- When an employee changes job categories or classifications (unless it is a part time position of less than .25FTE).

- When moving from Part-Time (PT) or short-term substitute (EX) position to a contributing position
- When an employee is moving from regular ( R ) to a regular \$24k or less (RU).
- When there is a break in service
- When a retiree is approved for Return-to-Work Program

*The requirements are supported by statute 2.82.2.1*

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### Don't Forget Summer Payroll

As we approach the end of the current fiscal year (**July 1 – June 30**), please adhere to the following payroll requirements to ensure compliance and accurate financial reporting.

#### 1. Mandatory Contract Payouts

- **Deadline:** All contracted employees must be fully paid out for their contracts by the end of **June**.
- **Fiscal Alignment:** All wages earned under the current contract must be reflected in the fiscal year ending June 30.

#### 2. Handling July Wage Adjustments

If contract wages are accidentally posted in July, they must be moved back to the June ledger. This is not automatic and requires:

- **Form 9:** Submission of the official adjustment form.
- **Adjustment File:** A corrected file to ensure the general ledger reflects the move.

#### 3. Who Should Be Paid in July?

July payroll should be strictly limited to staff members who are **physically working** at the schools during that month (e.g., summer school staff, 12-month administrators, or custodial crews).

### ACRONYMS

ERB – Educational Retirement Board

PAS - Pension Administration System

LAU – Local Administrative Unit

EDF – Employee Data Forms

FY – Fiscal Year

UAT – User Acceptance Testing

PERA – Public Employee Retirement Association