



ARA 3.10 EMPLOYEE BENEFITS

Chapters:

- I. Health and Financial Benefits, Generally
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Auditor's Office Administrative Rule Information and History

Questions about these administrative rules may be directed to the [Auditor's Office's Operations Management Division](#).

These rules were originally adopted by the City Auditor on December 11, 2017, and are adapted from [City of Portland Human Resources Administrative Rules](#), as noted below.

Revised and adopted by the City Auditor as ARA 3.10 on *Click to enter date*.

CHAPTER I: HEALTH AND FINANCIAL BENEFITS, GENERALLY

A. Health Benefits

1. The City of Portland provides health benefit programs to eligible employees and their qualified dependents. The City's plans are compliant with the Affordable Care Act. Additional information is available on the Bureau of Human Resources' [Health and Financial Benefits website](#) or by request to the Health and Financial Benefits Office.

2. Employees who are not hired into benefits-eligible status may still qualify for City paid coverage under the Affordable Care Act. Currently:
 - Employees may be eligible for coverage if they average 26 hours weekly over a pre-determined six-month measurement period.
 - Benefits are equivalent to CityBasic medical, dental, and vision coverage.
 - Eligibility can be maintained for up to six months, if a worker is employed and in paid status.
 - Coverage may continue if an employee averages 26 hours per week during the next measurement period.

Additional information (including measurement period dates, hours required, costs to the employee and Auditor's Office, and health plan details) can be found in the current [Benefits Handbook](#).

B. Life Insurance and Long-Term Disability

1. The City provides basic group term life insurance options for eligible employees at the amount of the employee's annual salary (up to \$50,000). Supplemental life insurance is available for all benefit-eligible employees to purchase. Coverage for the employee's spouse or domestic partner and dependent children is also available to purchase.

2. The City provides basic coverage for short and long-term disability plans to eligible employees. The City also offers buy-up options to supplement the basic

plans. The plans provide partial income protection for employees in case of loss of income. Short-term and long-term disability benefits are coordinated with PERS, Social Security, workers' compensation, and other sources of income to replace a portion of pre-disability earnings. Additional information is available on Human Resources' [Insurance \(Life and Long-Term Disability\) website](#).

C. Medical Expense and Dependent Care Reimbursement

The City offers flexible spending account plans, established under Section 125 of the Internal Revenue Code, which allow participants to be reimbursed for certain eligible medical and dependent care expenses with pre-tax dollars. Additional information is available on Human Resources' Flexible Spending Accounts website.

D. Deferred Compensation

Deferred compensation is a voluntary plan available to eligible permanent employees to help save for retirement on a pre-tax basis. Deferred compensation for public employees is regulated under Section 457 of the Internal Revenue Code. City Code Chapter 5.09 governs the City's deferred compensation program. Additional information is available on Human Resources' Deferred Compensation Program website.

E. Public Employee Retirement (PERS)

Eligible employees can establish membership under the Public Employee Retirement System ("PERS"). The City makes a monthly contribution to PERS on behalf of eligible employees. The contribution is six percent of the employee's pre-tax annual salary (or nine percent for sworn Portland Police and Fire & Rescue employees). In addition, the City contributes an actuarially-determined amount to PERS based on an annual valuation of plan costs. Additional information is available on the [Oregon Public Employees Retirement System website](#).

F. Social Security

Most employees pay a set amount each bi-weekly payroll cycle to the Social Security System, which is automatically deducted from their paychecks. The City matches this amount. For more information, contact the Social Security Administration.

This Chapter was adapted from:

[City Human Resources Administrative Rule 10.01 - Benefits General](#). Adopted by Council on March 6, 2002 (Ordinance No. 176302). Last revised January 1, 2020.

CHAPTER II: EMPLOYEE ASSISTANCE PROGRAM

1. Personal problems can affect an employee's job performance and impact co-workers. An employee assistance program is a comprehensive service based on the early identification of employees with a variety of personal issues. The City offers an employee assistance program for benefits-eligible City employees.
 2. Supervisors may recommend that employees use the program's services, or may make mandatory referrals, in consultation with Operations Management and legal counsel.
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This Chapter was adapted from:

[City Human Resources Administrative Rule 10.02 - Employee Assistance Program \(EAP\)](#). Adopted by Council on March 6, 2002 (Ordinance No. 176302). Last revised November 4, 2011.

CHAPTER III: TRIP REDUCTION INCENTIVE PROGRAM (TRIP)

A. Trip Reduction Incentive Program

The City and the Auditor's Office are dedicated to encouraging employees to use alternative modes of transportation to relieve road congestion, reduce harmful emissions, and improve employee health. The Trip Reduction Incentive Program ("TRIP") is designed to give employees incentives to choose alternatives to single occupant vehicle commuting.

1. All benefits eligible employees may participate in TRIP. Employees may sign up for TRIP prior to their benefits eligibility date for purposes of affecting participation upon eligibility.
2. Participants may take advantage of one of the following TRIP incentives each month:
 - \$50 towards each monthly Tri-Met, Columbia County Rider, or C-TRAN Pass; or \$600 for an annual option;
 - \$50 off carpool ("CarpoolCheck") or vanpool parking at downtown parking locations; or
 - \$50 of additional (taxable) monthly income for walk and bike commuters.
3. TRIP participants are also entitled to a free taxi ride in cases of emergency (if a participant takes the bus or a train or carools, bikes, or walks to work).
4. Participants in TRIP pledge to get to work 80 percent of the time by bus, MAX, carpool, walking, or biking (or some combination thereof). A typical full-time employee would use the alternative mode of transportation 16 days per month.
5. The City offers this incentive program to employees at its discretion and may modify or terminate this program at any time. The Bureau of Transportation's Active Transportation Division is responsible TRIP administration, and the Bureau of Human Resources is responsible for the financial processing.

B. TRIP Incentive Detail: Tri-Met Passes

1. The City will pay \$50 toward an employee's monthly Tri-Met pass or \$600 toward the annual option. Employees use pre-tax income to pay the balance and have the pass automatically loaded onto their Hop cards.
 - a. Annual Pass: During April and May, employees pay their share of a year's pass using pre-tax income with two deductions for the entire year. This option has the added benefit of receiving one month of free travel and locking in current fares.
 - b. Monthly Payroll Deduction: This option allows employees to pay for Tri-Met monthly passes using pre-tax income. Payroll will deduct the amount the employee owes Tri-Met for the pass (plus an administrative fee to be set annually) from the second paycheck of each month.
2. Employees may also be eligible for the transit pass incentive if they drive to a Tri-Met Park and Ride Lot and take a bus or train to work. Employees are not eligible for the transit pass incentive if they drive to a neighborhood street or undesignated parking area and use Tri-Met or C-TRAN as a shuttle service.
3. When an employee wishes to make changes to a transit pass payroll deduction, they must do so via SAP. It takes approximately six weeks' lead-time to process changes. Employees may also make changes to their zone pass or mailing address via SAP.

C. TRIP Incentive Detail: Columbia County Rider Passes

The City will pay \$50 per month towards the purchase of a Columbia County Rider transit pass. Employees pay the balance of the pass by sending a personal check, along with a \$50 Columbia County Rider Transit Check (available from the City's TRIP Coordinator), to Columbia County Rider.

D. TRIP Incentive Detail: C-TRAN Passes

1. The City will pay \$50 per month towards an employee's C-TRAN pass or \$600 for the annual option. Employees use pre-tax income to pay the balance and have the pass automatically loaded onto their Hop cards.
 - a. Annual Pass: During April and May, employees pay their share of a year's passes using pre-tax income with two deductions for the entire year. This option has the added benefit of receiving one month of free travel and locking in current fares.
 - b. Monthly Payroll Deduction: This option allows employees to pay for CTRAN monthly passes using pre-tax income. Payroll will deduct the amount the employee owes CTRAN for the pass (plus an administrative fee set annually) from the second paycheck of each month.
2. Employees may be eligible for the transit pass incentive if they drive to a C-TRAN Park and Ride Lot and take a bus or train to work.
3. When an employee wishes to make changes to a transit pass payroll deduction, they must do so via the SAP CityLink Portal. It takes approximately 6 weeks lead-time to process these changes. Employees may also make changes to their zone pass or mailing address via the SAP CityLink Portal.

E. TRIP Incentive Detail: CarpoolCheck

Carpooling employees may receive a \$50 CarpoolCheck to use toward monthly parking fees at specific parking facilities. Monthly fees and availability will vary. Employees may contact their timekeeper or designated transportation coordinator for more information.

1. Participants have two options:
 - a. Use selected garages and on-street locations participating in the City's discounted carpool program. Each month, the employee sends in a

- CarpoolCheck with the employee's share of the monthly parking charge. Employees may contact Parking Control at (503) 823-6841 to enroll.
- b. Use parking facilities where there is a regular monthly commuter rate. Each month, employees can apply their \$50 CarpoolCheck toward the monthly parking charge. Employee may contact PBOT Options at (503) 823-6051 to enroll.
2. Employees may combine CarpoolChecks with other City employees to further reduce the parking fee. CarpoolChecks cannot be redeemed for cash.
 3. Carpoolers must comply with the carpool parking permit policies and procedures for the carpool parking program option selected, which include:
 - a. Employees must carpool with at least one other person, at least four days a week, both ways (to and from work). Other carpool members need not be City employees, but must work or go to school within the boundary area indicated on the Carpool Zone Map.
 - b. Transportation will verify information on carpool applications.
 - i. Inaccurate applications will be denied, and all carpoolers listed on the inaccurate application will be ineligible for TRIP participation for one year.
 - ii. Transportation will periodically contact carpoolers to determine authenticity.
 - iii. Information regarding carpool members' addresses, phone numbers, and work locations must be kept current and updated by completing a new carpool application form.
 - iv. Should a carpool member take a leave of absence for a period greater than four weeks, it is the responsibility of the other carpoolers to find another qualified participant and complete a new carpool application form.

4. Human Resources will verify information on carpool applications. Inaccurate applications will be denied, and all carpoolers listed on the inaccurate application will be ineligible of participation in TRIP for one year.
 - a. Human Resources will periodically contact carpoolers to determine authenticity.
 - b. Information regarding carpool members' addresses, phone numbers, and work locations must be kept current and updated by completing a new carpool application form.

F. TRIP Incentive Details: Bike and Walk Bucks

1. City employees are eligible for [Bike and Walk Bucks](#) after they bike, walk, or take public transit to work at least 80 percent of their scheduled workdays in any one month. If a participant uses transit in combination with bike commuting or walking, the employee cannot also receive a transit pass subsidy.
 - a. "Bike" includes any non-motorized, pedal-operated vehicle or an electric assisted bicycle with both fully operative pedals for human propulsion, electric motor with power output of no more than 1,000 watts, and a maximum speed that does not exceed 20 mph on level ground. City employees who use other forms of non-motorized transportation, such as skateboards and skates, are eligible for Bike and Walk Bucks.
 - b. "Walk" includes the unassisted travel of a person by foot or use of a wheelchair by a disabled employee.
2. A participant is not eligible for Bike and Walk Bucks if they drive or ride in a car, van, or truck for any part of their bike or walk commute days.
3. Participants will receive \$50 for each month they bike or walk to work at least 80 percent of the time. Sick and vacation days are not counted against the

participant. The \$50 is considered taxable income under the Internal Revenue Code. The funds are added to their paychecks on a quarterly basis.

4. Participants must submit a completed Bike and Walk Bucks certificate to Payroll no later than the last workdays of March, June, September and December to receive the benefit amount in the second paycheck of the following month. Employees can contact Transportation to be included on an email reminder list.

G. Emergency Ride Home Program

Tri-Met will pay for a taxi ride home if an employee who carools, uses transit, walks, bikes, skateboards, or skates to work needs to leave work unexpectedly because of an emergency. Emergency ride home rules and vouchers are available from timekeepers and designated transportation coordinators. Authorized reasons for using the Emergency Ride Home Program are:

- The employee cannot take transit, walk, or bike home because they are ill;
- The employee's parent, sibling, spouse, domestic partner, child, or guardian is seriously ill, has been in an accident, or died;
- A serious problem or crisis arises, such as damage to home or property or a problem at school or daycare, which requires immediate attention; or
- The driver of the carpool or vanpool has to leave early to address an emergency and the other riders are stranded.

H. Administration

1. Participants may sign up for TRIP by using the SAP CityLink Portal.
2. If an employee wishes to make changes to a transit pass payroll deduction for long vacations, leaves, or retirement, they must do so via the SAP CityLink Portal ahead of time. Employees should allow approximately six weeks for changes to take effect.

3. Transportation's Operations Division Manager or designee is responsible for the general operation of TRIP and has the authority to decide all questions arising in connection with the administration, interpretation, and application of the Program.

I. Disqualification / Violations

The TRIP program relies heavily on the honor system. Reported violations will be investigated and violators will be subject to disqualification and/or disciplinary action.

J. Contact Information

Questions or comments about TRIP rules and eligibility should be directed to Human Resources.

This Chapter was adapted from:

[City Human Resources Administrative Rule 10.03 - Trip Reduction Incentive Program \(TRIP\)](#). Adopted by Council on March 6, 2002 (Ordinance No. 176302). Last revised January 1, 2020.

CHAPTER IV: DOMESTIC PARTNERS

A. Domestic Partners: Eligibility for Benefits

1. The City and the Auditor's Office recognize domestic partnerships without regard to the gender or sex of the partners. A domestic partner who meets the following criteria is considered equivalent to a spouse for purposes of eligibility for health and non-health benefits:
 - Is 18 years of age or older and shares the same permanent residence and household with the employee
 - Is the exclusive domestic partner of the employee
 - Is not married to anyone
 - Is not related to the employee by blood, closer than would be a bar to marriage in the state of the employee's permanent residence
 - Was mentally competent to enter into a contract when the partnership began
 - Is jointly responsible for common welfare, including providing for basic living expenses such as food, shelter, and other necessities of life, with the employee.
2. An employee must submit the [Affidavit of Benefit Eligible Dependent Status](#) to the Benefit Office to enroll a domestic partner in health coverage. The signatures of the employee and their domestic partner must be notarized. Additional information regarding domestic partner health benefits is available on the City's [Benefits website](#).
3. An employee must submit a separate [Statement of Domestic Partnership](#) to receive non-health City benefits, such as catastrophic leave, funeral leave, dependent care, or family medical (FMLA / OFLA) leave. The Statement of Domestic Partnership must be placed in the employee's personnel file for leave management purposes.

B. Termination of Domestic Partnership

An employee must report the termination of a domestic partnership, within 60 days of the event, by filing a [Notice of Change in Family Status](#) form.

This Chapter was adapted from:

[City Human Resources Administrative Rule 2.05 - Domestic Partners](#). Adopted by Council on March 6, 2002 (Ordinance No. 176302). Last revised July 1, 2004.