

Indiana State Requirement Reports

New World ERP – Human Resources – State Requirements



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OVERVIEW

This guide shows you how to set up and generate Indiana state requirement reports and transmittal files. The reports and files contain pension data that may be submitted to the state each pay period.

For more information about these remittances, please refer to the following Web sites:

- <http://www.in.gov/dwd/employer>
- <http://www.in.gov/perf/pe>

Note: The reports described in this guide require the setup of benefit groups and hours codes in Human Resources Maintenance.

The following reports are included:

Indiana Certified Administrative Staff Report- Use this page to generate a report providing the pay ranges of certified administrative staff as of a specified date.

Indiana Certified Employees Report- Use this page to create a report and transmittal file of certified employee data for public, accredited nonpublic and charter schools. The transmittal file may be submitted to federal and state agencies.

Indiana Non-Certified Employees Report- Use this page to generate a report providing the pay ranges of certified employees by classifications as of a specified date.

Indiana Certified Salary Report- Use this page to generate a report providing a breakdown of certified employees by annual rates of pay, years of experience, levels of education paid and total number of employees as of a specified date. This data may be reviewed and modified before it is transmitted to the state.

Indiana DOE-NE Report- Use this page to generate reports of non-certified and other personnel, by category, as of October 1 of the current school year. For each category, the head count and full-time equivalency (FTE) will be reported.

Form 100-R- Use this page to generate a report and transmittal showing the work site addresses, employment and total compensation of all employees who worked for the city during the calendar year just ended.

PERF Report- Use the Indiana PERF (Public Employees Retirement Fund) Report page to generate a report and transmittal file of the retirement contributions of Indiana public employees.

Indiana Retirement Report- Use this page to perform the setup needed to create your retirement data. Setup includes employer information, hours codes and the deductions and benefits used to calculate employee and employer contributions. Use this page to review and modify retirement data for each employee within the organization, create new data and generate a report and transmittal file of the data. The transmittal file may be submitted to the state each pay period.

Quarterly Tax and Wage Report- Use this page to generate a report and transmittal file of quarterly tax and wage information to be filed with the state of Indiana each quarter.

New Hire Report- Use this page to generate the Indiana New Hire Report and transmittal file that provide information on employees who have been hired or rehired within selected date ranges.

INDIANA ANNUAL FINANCIAL REPORTS

INDIANA ANNUAL FINANCIAL REPORT MAINTENANCE

Human Resources > State Requirements > IN > Annual Financial Report Maintenance

Use this page to set up and maintain the following Indiana reports:

- Certified Administrative Staff Report
- Certified Salary Report
- DOE-NE Report
- Non-Certified Employees Report

USER AUTHORIZATIONS

To have the *Annual Financial Report Maintenance* option appear on a user's menu, the user needs permission to the security component of the same name in Maintenance. To give permission, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. Select the user.
3. Click the **Permissions** button.
4. Click the *Show Search* link.
5. In the *Component Name* field, type **Indiana Annual Financial Report Maintenance** or any part of the name, such as **Indiana annual** (entry is not case sensitive).
6. Click the **Search** button.
7. In the resulting grid, select the row containing the *Indiana Annual Financial Report Maintenance* component.
8. Make sure green check marks appear in the *All* and *Print* columns. If they are not there, click the **Check All** button.
9. Click **Save** to retain the settings.

The new authorization will take effect once the user has logged off and back onto the system. The Indiana Annual Financial Maintenance page contains four tabs, one for each report:

CERTIFIED ADMINISTRATIVE STAFF

Use the **Certified Administrative Staff** tab to set up the certified position and administrative staff mappings that will be used for the reporting of certified administrative salary ranges as required by law.

Indiana Annual Financial Report Maintenance			
Certified Administrative Staff	Certified Salary Schedule	DOE-NE	Non-Certified Employee
Position	Department	Work Site	Administrative Staff
▽ Contains...	▽ Contains...	▽ Contains...	▽
0000-000-15 - Ashley Test 2 IN	ADM_HRM - Admin.Human Resources	City Hall - City Hall	Yes

First make the position in Maintenance>Human Resources>Positions and mark the position as certified.

The grid of certified positions is sorted by *Position* number in ascending order.

To set up the report to include administrative staff in a certified *Position*, click in the *Administrative Staff* cell corresponding with the position, and select **Yes** from the drop-down. To exclude administrative staff from a certified position, leave the cell blank or select **No**.

CERTIFIED SALARY SCHEDULE

Use **Certified Salary Schedule** tab to perform the setup needed to generate the **Indiana Certified Salary Report**, a breakdown of certified employees by annual rates of pay, years of experience, levels of education paid and total number of employees as of a specified date.

Indiana Annual Financial Report Maintenance			
Certified Administrative Staff	Certified Salary Schedule	DOE-NE	Non-Certified Employee
Grade Type	Grade Code	Grade Description	Education Level
▽ Contains...	▽ Contains...	▽ Contains...	▽
Annual	100	City Manager	
Annual	850	850	
Annual	AnnualConversion	Annual Conversion	
Annual	E01_A	Exempt E1	

MAINTENANCE PREREQUISITES

Validation Set 471

Setting up the Indiana Certified Salary Report involves the association of education levels to job grade types; however, before you will be able to associate the two, you will need to set up the education levels in validation set 471, IN Annual Report Card Educator Levels, in Maintenance. To do so, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.
2. Select validation set **471** so that it is highlighted.
3. Click the **Values** button. The Validation Set Values List-471 IN Annual Report Card Educator Levels page will open.
4. Click the **New** button.
5. The **Validation Set Value 471** page will open.

Validation Set List > Validation Set Value List

Validation Set Value - 471

Validation Set 471

Value

Description ✕

[Save](#)
[Save/New](#)
[Delete](#)
[Reset](#)
[Alternates](#)

6. In the *Value* field, type **01**, as shown in the image above.
7. In the *Description* field, type **Bachelor's**.
8. Click the **Save/New** button to save the entries and clear the fields for the next education level.
9. Repeat steps 6 and 7 for the remaining values that need to be set up, clicking Save after making entries for the final value.

The remaining values are as follows:

Value	Description
02	Bachelors + 15
03	Masters
04	Masters + 15
05	Masters + 30
06	Masters + 45
07	Doctorate

Note: The transmittal file will use the Value to identify the educational level being sent to the state; therefore, take care to enter each Value as shown.

10. When you are finished with all entries, click the *Validation Set Values List* breadcrumb, located in the top-left corner of the Validation Set Value page, to reopen the **Validation Set Values List 471** page, where your entries will appear in a grid.

Validation Set List
Validation Set Values List - 471 IN Annual Report Card Education Level

Value	Description
01	Bachelors
02	Bachelors + 15
03	Masters
04	Masters + 15
05	Masters + 30
06	Masters + 45
07	Doctorate

[New](#)
[Delete](#)
[Refresh](#)
[Alternates](#)
[Import Mappings](#)

Grade Step Entry

On the Grade Step Entry page in Earnings Maintenance (Maintenance > Human Resources > Earnings Maintenance > Grades > New/Edit), set up the *Sequence* numbers in the Steps table to correspond with the *Years of Service* on the report; for example, in the image shown below, step **1** of the job grade corresponds to zero (**0**) years of service, while step **2** corresponds to **1** year of service, step **3** to **2** years of service, and so on:

Grade List
Grade Step Entry

Grade

Code

Description

Grade Type Midpoint

Minimum 1st Quartile

Maximum 3rd Quartile

Steps

	Step	Sequence	Amount
*			
	1	0	54910
	2	1	55205
	3	2	55490
	4	3	55715
⇒	5	4	56110

Link Education Levels to Job Types

The grid on the Indiana Certified Salary Maintenance page is pre-populated with all active and inactive grade types, sorted by *Grade Type*, followed by *Grade Code*. To associate an education level with a grade type, double-click in the *Education Level* cell corresponding to the *Grade Type* to open a drop-down list of the available education levels, and click the level you want. It will populate the *Education Level* cell.

Once you have completed the setup and maintenance steps, you will be ready to generate the **Indiana Certified Salary Report**. This data may be reviewed and modified before it is transmitted to the state.

DOE-NE

Use **DOE-NE** tab to set up the position and category mappings that will be used for the reporting of non-certified and other personnel, by category, as of October 1 of the current school year.

Indiana Annual Financial Report Maintenance							
Certified Administrative Staff		Certified Salary Schedule		DOE-NE	Non-Certified Employee		
Position	Department	Work Site	Certified	DOE-NE Category A	Part A Position	DOE-NE Category B	Part B Position
0000-000-11 - Teacher	ADM_ADM - Admin/Administrative Services						
0000-000-13 - Ashley IN Test	ADM_ADM - Admin/Administrative Services	City Hall - City Hall					
0000-000-15 - Ashley Test 2 IN	ADM_HRM - Admin/Human Resources	City Hall - City Hall	✓				
0101-300-01 - Mayor	MC_LEG - Mayor & Council/Legislative						

First make the position in Maintenance>Human Resources>Positions (Certified field can be anything).

In the search fields provided at the top of the page, make selections to determine the type of non-certified and other personnel data you need to view or edit. You may leave all fields blank to display all data.

After making your selections, click the **Search** button. A grid of data matching your selections will display.

The grid is sorted by *Position* number in ascending order. The *Position* column contains every active and inactive position that has been defined in Position Control.

The *Certified* column indicates whether a corresponding position has been marked as certified.

The *DOE-NE Category A* column corresponds with the *Part A Position* column, and the *DOE-NE Category B* column corresponds with the *Part B Position* column.

Note: Two validation sets, 472 (DOE-NE Category A) and 475 (DOE-NE Category B), have been created for the DOE-NE Category. Two validation sets, 473 (Part A Position) and 474 (Part B Position), have been created for mapping to the DOE-NE Category A values and the DOE-NE Category B values, respectively.

To map a category to a position, double-click in the *DOE-NE Category* cell that corresponds with the *Position*, and select from the drop-down list of available categories.

A position can be mapped to Category A and Category B, Category A only, Category B only or neither.

A position newly added in Position Control will display in the grid with the *DOE-NE Category*, *Part A Position* and *Part B Position* blank.

NON-CERTIFIED EMPLOYEE

Use the **Non-Certified Employee** tab to set up and maintain the position, category and classification mappings that will be used for the reporting of **non-certified employee class and pay data**.

Indiana Annual Financial Report Maintenance				
Certified Administrative Staff	Certified Salary Schedule	DOE-NE	Non-Certified Employee	
Position	Department	Work Site	Category	Classification
0000-000-13 - Ashley IN Test	ADM,ADM - Admin/Administrative Services	City Hall - City Hall		

First make the position in Maintenance>Human Resources>Positions and mark the position as Non-Certified.

On first opening the tab, you will see search fields and an empty grid. In the search fields, make selections to narrow the type(s) of non-certified data you need to view or set up for the report. You may leave all fields blank to display all data.

Click the **Search** button; the grid will populate with the data that matches your selections.

The grid is sorted by *Position* number in ascending order. The *Category* column contains the broad categories under which the positions fall; the *Classification* column contains more specific position classifications within the categories.

Note: Validation set 478 (Non-Certified Category) has been created for non-certified category values. Validation set 479 (Non-Certified Classification) has been created for non-certified classification values.

To map a category to a position, double-click in the *Category* cell that corresponds with the Position, and select from the drop-down list of available categories (validation set 478).

To map a classification to the category and position, double-click the *Classification* cell that corresponds with the *Category* and *Position*, and select from the drop-down list of available classifications (validation set 479).

The selection of a category requires the selection of a corresponding classification, and vice-versa.

INDIANA CERTIFIED ADMINISTRATIVE STAFF REPORT

Human Resources > State Requirements > IN > Certified Administrative Staff Report

Use this page to generate a report providing the pay ranges of certified administrative staff as of a specified date. Make sure to do the set up under Indiana Financial Report Maintenance first as stated above.

IN Certified Administrative Staff Report			
Load Saved Report	<input type="text"/>	Distribution Group	<input type="text"/>
Override Report Title	<input type="text"/>	Email Group	<input type="text"/>
As of Date		<input type="text"/>	
<input type="button" value="Submit"/> <input type="button" value="Save"/> <input type="button" value="Save As"/> <input type="button" value="Delete"/> <input type="button" value="Reset"/>			

USER AUTHORIZATIONS

To have the *Certified Administrative Staff Report* option appear on a user's menu, the user needs permission to the security component of the same name in Maintenance. To give permission, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. Select the user.

3. Click the **Permissions** button.
4. Click the *Show Search* link.
5. In the *Component Name* field, type **Indiana Certified Administrative Staff Report** or any part of the name, such as **Indiana certified** (entry is not case sensitive).
6. Click the **Search** button.
7. In the resulting grid, select the row containing the **Indiana Certified Administrative Staff Report** component.
8. Make sure green check marks appear in the *All* and *Print* columns. If they are not there, click the **Check All** button.
9. Click **Save** to retain the settings.

The new authorization will take effect once the user has logged off and back onto the system.

In the *As of Date* field, select the date as of which to capture certified administrative staff pay data. Employees must be holding certified positions as of this date.

After making your selections on this page, click **Submit** to generate and display the report.

Following are the conditions that must be met for an employee to appear on the report:

- The employee's *Employment Status* in Maintenance must have *Payroll Initialization* checked as of the *As of Date*.
- The employee must have a job *As of Date*.
- The job cannot have an **Out of Position** status on the *As of Date*.
- The employee must have a certified position marked as **Yes** in the *Administrative Staff* column of the **Indiana Annual Financial Report Maintenance** page.

SAMPLE OUTPUT

Indiana Certified Salary Report - Windows Internet Explorer

City of NWS

Indiana Certified Salary Report

As of 05/04/12

Years of Service	# of Bachelors	# of People	# of FTEs	# of Bachelors + 15	# of People	# of FTEs	# of Masters	# of People	# of FTEs	# of Masters + 15	# of People	# of FTEs	# of Masters + 30	# of People	# of FTEs	# of Doctorate	# of People	# of FTEs
0																		
1				7.73	5	2.50				8.76	25	13.00	18.54	10	5.00			
2										9.01	3	2.00						
3										9.27	4	2.00	19.06	2	1.00	9.53	1	0.50
4	40,210.0	1	1.00							9.52	3	1.50				9.78	1	0.50
5																		
6										9.79	1	0.50	19.57	1	0.50			
7										10.04	1	0.50	19.82	1	0.50	10.29	1	0.50
8													20.09	2	1.00			
9										10.55	1	0.50	20.34	3	1.50			
10													20.60	2	1.00			
11																		
12													21.37	1	0.50			
13													21.63	9	4.50	12.10	4	2.00
Total		1	1.00		5	2.50		1	1.00		38	20.00		31	15.50		7	3.50
Grand Totals	Certified Part-Time Employees 79																	
Grand Totals	Certified Full-Time Employees 4																	
Grand Totals	Employees 83																	

Run by NWS on 05/04/2012 02:05:24 PM

Page 1 of 1

Send to myReports

The report output contains the following columns of data:

- **Classification:** Administrative employees in certified positions. To expand the list of employees, click the plus sign (+) to the left of the Administrator column label.
- **Lowest Salary:** Lowest salary amount on the list of eligible employees.
- **Highest Salary:** Highest salary amount on the list of eligible employees.
- **Average Salary:** Average salary amount, derived by adding all salaries on the list of eligible employees and dividing by the number of employees. The amount is rounded to two decimals.
- **Number of Personnel:** Total number of eligible employees listed on the report.

INDIANA CERTIFIED EMPLOYEES REPORT

Human Resources > State Requirements > IN > Certified Employees Report

Use this page to create a report and transmittal file of certified employee data for public, accredited nonpublic and charter schools. The transmittal file may be submitted to federal and state agencies.

Note: A security component, Indiana Certified Employee Report, exists for this option. Navigate to Maintenance > new world ERP Suite > Security > Users, give permission to the users who should have access to this option, and click Save to retain the settings. The new authorization will take effect once the user has logged off and back on to the system.

SETUP

The Indiana Certified Employees Report requires the setup of one validation set and six user-defined fields (UDFs) in the Employment section of the **Employment** tab in Workforce Administration.

The following steps show you how to set up these fields and a section header for making them easy to locate in the Employment section:

VALIDATION SET

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.
2. Click **New** to open the Validation Set dialog.
3. Select an unused validation set *Number*.
4. In the *Name* field, type **IN Prior Year Employment**.
5. In the *Description* field, type **IN Prior Year Employment** or whatever best helps you identify the purpose of the validation set.
6. Click **OK** to save.
7. To add values to the new validation set, select it in the Validations Set List, and click the **Values** button.

SECTION HEADER

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Employee Employment** from the *Record Type* dropdown.
3. Select **Section Headers** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined section headers in the Employment section of the **Employment** tab in Workforce Administration.
4. Click **New**. The User-Defined Fields Section Header popup will open.
5. For *Section Header*, type **Indiana Certified Employees**.
6. Use the *Sequence Number* field to tell where you want the section to appear in relation to other sections on the **Employment** tab: top of the page (**1**), bottom of the page (**99**) or somewhere in between (**2-98**).
7. Click **OK**. The popup will close, and the grid on User-Defined Field List page will refresh to show the newly added **Indiana Certified Employees** section header.

USER-DEFINED FIELDS

To set up the user-defined field that will appear under the **Indiana Certified Employees** header in the Employment section of the **Employment** tab, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Employee Employment** from the *Record Type* dropdown.

3. Select **Attributes** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined fields in the Employment section.
4. Click **New**. The User-Defined Fields popup will open.
5. Complete the fields exactly as follows:

Field	Value
<i>Name</i>	<i>IN School Personnel Number</i>
<i>Section Header</i>	<i>Indiana Certified Employees</i>
<i>Sequence Number</i>	1
<i>Data Type</i>	Text
<i>Maximum Length</i>	8
<i>Required</i>	(leave unchecked)

6. Click **OK**. The *IN School Personnel Number* field will be added to the *Employee Employment Attributes* grid on the User-Defined Field List page.
7. Repeat steps 1-6 for the remaining UDFs that need to be set up. The following tables contain the entries you will need to make:

Field	Value
<i>Name</i>	<i>IN Total Years Experience</i>
<i>Section Header</i>	<i>Indiana Certified Employees</i>
<i>Sequence Number</i>	2
<i>Data Type</i>	Text
<i>Maximum Length</i>	2
<i>Required</i>	(leave unchecked)

Field	Value
Name	<i>IN Prior Year Employment</i>
Section Header	<i>Indiana Certified Employees</i>
Sequence Number	3
Data Type	<i>Validation Set</i>
Validation Set	<i>IN Prior Year Employment</i>
Required	(leave unchecked)

8. The *IN Prior Year Employment* code will identify each employee's occupation prior to this year. (See the section, **Employee Setup for Indiana Certified Employees Reporting**, for a list of the allowable codes.)

Field	Value
Name	<i>IN Percent Employed</i>
Section Header	<i>Indiana Certified Employees</i>
Sequence Number	4
Data Type	<i>Text</i>
Maximum Length	3
Required	(leave unchecked)

Field	Value
Name	<i>IN Percent of Salary</i>
Section Header	<i>Indiana Certified Employees</i>
Sequence Number	5

Field	Value
<i>Data Type</i>	<i>Text</i>
<i>Maximum Length</i>	3
<i>Required</i>	(leave unchecked)

Field	Value
<i>Name</i>	<i>IN First Year Teacher</i>
<i>Section Header</i>	<i>Indiana Certified Employees</i>
<i>Sequence Number</i>	6
<i>Data Type</i>	<i>Check Box</i>

When you are finished, the *Employee Employment Attributes* grid on the User-Defined Field List page should contain a row for each user-defined field you have saved as part of the **Indiana Certified Employees** section.

EMPLOYEE STATUS ALTERNATE VALUES

To set up *Education Type* values that match the values the state expects in the transmittal file, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.
2. Select (highlight) validation set number *71 Employee Education*.
3. Click the **Values** button. The Validation Set Values List page will open.
4. Select (highlight) an employee education value, such as the one for ***Bachelor's Degree***.
5. Click the **Alternates** button. The Alternate Values List page for the ***Bachelor's Degree*** value will open.
6. Click the **New** button. The Alternate Value dialog will open.
7. In the *Usage Type* field, select ***NWS Quick Value***.
8. In the *Value* field, type the code corresponding with the employee education you have selected; for example, if you have selected ***Bachelor's Degree***, the *Value* needs to be **3**, as the image above shows.
9. You may type a complete *Description* of the value, although it is not required.
10. Click **OK** to save the entry and have it added to the grid on the Alternate Values List page.

11. Repeat steps 4-10 for each employee education value applicable to the Indiana Certified Employees transmittal. The following table contains the alternate values expected:

Employee Education Value	Alternate Value
<i>High School Diploma or Less</i>	1
<i>Associate Degree of Two-Year Diploma</i>	2
<i>Bachelor's Degree</i>	3
<i>Master's Degree</i>	4
<i>Other Second-Level Degree (Specialist, etc.)</i>	5
<i>Doctorate</i>	6
<i>Other</i>	7

EMPLOYEE SETUP FOR INDIANA CERTIFIED EMPLOYEES REPORTING

To set up an employee for Indiana Certified Employees reporting, follow these steps:

1. Navigate to Human Resources > Workforce Administration > Search.
2. Use the search controls to produce a list of employees.
3. Click the *Employee Number* link for the employee you want to set up for certified reporting. The employee's Workforce Administration page will open.
4. Click the **Employment** tab.
5. Click the **Edit** button on the left side of the Employment header.
6. Scroll down to the **Indiana Certified Employees** section.
7. Make valid selections in the user-defined fields in the **Indiana Certified Employees** section.
8. The following table contains the allowable codes for the *IN Prior Year Employment* field:

Code	Description
1	Employed in the schools of this corporation
2	Employed in another Indiana public school corporation
3	Employed in a public school outside of Indiana

Code	Description
4	Employed in a college or university
5	Employed in a private or parochial school
6	Employed in a business or industry
7	Employed in the military or governmental service
8	Attended a college or university in Indiana
9	Attended a college or university outside of Indiana
10	Homemaker
11	Other
12	Employed in the schools of this corporation in a noncertified position

Note: These codes are part of a validation set. To add or maintain valid IN Prior Year Employment codes, navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List, select (highlight) the IN Prior Year Employment validation set, and click the Values button.

9. After making your selections, click **Save**.

10. Repeat these steps for each employee who is to be included in the report.

CERTIFIED EMPLOYEES REPORT FIELDS

Indiana Certified Employee Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

Corp Number

Effective Date

Submit

Reset

Save

Save As

Delete

The following table contains descriptions of the fields on the Indiana Certified Employees Report page:

Field	Description
<i>Corp Number</i>	Required. Four-character, state-assigned corporation number.
<i>Effective Date</i>	Required. Data collected as of this effective date.

After making your selections on this page, click **Submit** to generate and display a report showing the data the transmittal file will contain. The transmittal file itself will be submitted to **myReports**.

INDIANA NON-CERTIFIED EMPLOYEES REPORT

Human Resources > State Requirements > IN > Non-Certified Employees Report

Use this page to generate a report providing the pay ranges of certified employees by classifications as of a specified date.

Indiana Non-Certified Employee Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

As of Date

Submit

Save

Save As

Delete

Reset

USER AUTHORIZATIONS

To have the *Non-Certified Employees Report* option appear on a user's menu, the user needs permission to the security component of the same name in Maintenance. To give permission, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. Select the user.
3. Click the **Permissions** button.
4. Click the *Show Search* link.
5. In the *Component Name* field, type **Indiana Non-Certified Employees Report** or any part of the name, such as **indiana non-certified** (entry is not case sensitive).
6. Click the **Search** button.
7. In the resulting grid, select the row containing the **Indiana Non-Certified Employees Report** component.
8. Make sure green check marks appear in the *All* and *Print* columns. If they are not there, click the **Check All** button.
9. Click **Save** to retain the settings.

The new authorization will take effect once the user has logged off and back onto the system.

In the *As of Date* field, select the date as of which to capture non-certified employees class and pay data. Employees must be holding non-certified positions as of this date.

After making your selections on this page, click **Submit** to generate and display the report, the full title of which is the Indiana Non-Certified Employees Class and Pay Rate Report.

Following are the conditions that must be met for an employee to appear on the report:

- The employee's *Employment Status* in Maintenance must have *Payroll Initialization* checked as of the *As of Date*.
- The employee must have a job *As of Date*.

- The job cannot have an **Out of Position** status on the *As of Date*.
- The employee must have a non-certified position and the appropriate category and class set up on the **Indiana Annual Financial Report Maintenance** page.

SAMPLE OUTPUT

Classification	Lowest	Highest
Category: Executive/Accounting	532.28	101,992.00
<div> <div>+</div> <div>Clerical</div> </div>		
<div> <div>+</div> <div>Position</div> </div>	Employee	Salary
11-002 - City Commissioner	3311 Jolson, Al Joe Jr	101,992.00
11-002 - City Commissioner	125 Kuklenski, Cella J	532.28
11-004 - City Commissioner	2197 Mcneen, Preston L	532.28
11-003 - City Commissioner	6 Teal, Harley W	532.28
Category: Instructional/Pupil Services	638.73	638.73
<div> <div>+</div> <div>Clerical</div> </div>		
<div> <div>+</div> <div>Position</div> </div>	Employee	Salary
11-001 - Mayor	2509 Kenoyer, Quincy D	638.73
Category: Transportation Services	8.73	8.73
<div> <div>+</div> <div>Bus Driver</div> </div>		
<div> <div>+</div> <div>Position</div> </div>	Employee	Salary
14-015 - Office Assistant II	2192 Markle, Karson S	8.73
<div> <div>+</div> <div>Crossing Guard</div> </div>		
<div> <div>+</div> <div>Position</div> </div>	Employee	Salary
14-017 - Sr Accounting Technician	42 Norrd, Marvin	17.10
<div> <div>Grand Totals</div> <div>Non-Certified Full-time Employees 6</div> <div>Grand Totals</div> <div>Non-Certified Part-time Employees 1</div> </div>		

Run by NWS on 02/18/2013 10:39:20 AM Page 1 of 1

Send to myreports

The report output contains the following columns of data:

- **Classification:** Employee categories. To expand a category and view its list of non-certified employees, positions and associated salaries, click the plus sign (+) to the left of the Category label.
- **Lowest:** Lowest salary amount on the list of eligible employees. An amount may be hourly or annual, depending on the employee's setup for the classification.
- **Highest:** Highest salary amount on the list of eligible employees. An amount may be hourly or annual, depending on the employee's setup for the classification.
- **FTE:** The report also shows the total number of non-certified full-time employees and the total number of non-certified part-time employees. Full-time is defined as a full-time equivalency (FTE) of greater than .6; part-time is defined as an FTE of less than .6.
- **Multiple positions:** An employee with multiple positions may appear more than once on the report.

INDIANA CERTIFIED SALARY REPORT

Human Resources > State Requirements > IN > Certified Salary Report

Use this page to generate a report providing a breakdown of certified employees by annual rates of pay, years of experience, levels of education paid and total number of employees as of a specified date. This data may be reviewed and modified before it is transmitted to the state.

Indiana Certified Salary Report

Load Saved Report

▼

Distribution Group

▼

Override Report Title

Email Group

▼

As of Date

Submit

Save

Save As

Delete

Reset

Note: For a report to generate, make sure you have completed the required setup and maintenance steps.

In the *As of Date* field, select the date as of which to capture certified salary data. Employees must be holding certified positions as of this date, and their job grades must be associated with education levels. The full-time equivalency (FTE) of each position also must be equal to or greater than 0.5.

After making your selections on this page, click **Submit** to generate and display the **report**.

Indiana Certified Salary Report - Windows Internet Explorer

City of NWS

Indiana Certified Salary Report

As of 05/04/12

Years of Service	# of Bachelors	# of FTEs	# of Bachelors + 15	# of FTEs	# of Masters	# of FTEs	Masters + 15	# of FTEs	Masters + 30	# of FTEs	Doctorate	# of FTEs		
0			7.73	5	2.50				8.76	25	13.00	18.54	10	5.00
1									9.01	3	2.00			
2									9.27	4	2.00			
3									9.52	3	1.50			
4	40,210.00	1	1.00									9.53	1	0.50
5												9.78	1	0.50
6														
7														
8														
9														
10														
11														
12														
13														
Total		1	1.00	5	2.50	1	1.00	38	20.00	31	15.50	7	3.50	
Grand Totals	Certified Part-Time Employees 79													
Grand Totals	Certified Full-Time Employees 4													
Grand Totals	Employees 83													

Run by NWS on 05/04/2012 02:05:24 PM

Page 1 of 1

Send to myReports

INDIANA DOE-NE REPORT

Human Resources > State Requirements > IN > DOE-NE Report

Use this page to generate reports of non-certified and other personnel, by category, as of October 1 of the current school year. For each category, the head count and full-time equivalency (FTE) are reported.

Indiana DOE-NE Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

As of Date

Submit

Save

Save As

Delete

Reset

USER AUTHORIZATIONS

For the *DOE-NE Maintenance* and *DOE-NE Report* options to appear on a user's menu, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page will open.
2. Select (highlight) the user in the list.
3. Click the **Permissions** button. The Permissions page will open, containing a grid of security components.
4. Click the *Show Search* link, located in the top-right corner of the page, to display search fields above the grid.
5. In the *Component Name* field, type **Indiana DOE-NE** or some portion of it (the entry is not case sensitive).
6. Click the Search button. The grid will refresh to show only the Indiana DOE-NE security component.
7. Check the Indiana DOE-NE features to which the user will have access. If the user is to have access to all features, click the **Check All** button.
8. Click **Save**.

The user will need to log off and back onto the system before the new options will be available on the menu.

In the *As of Date* field, select the date as of which to capture DOE-NE data.

After making your selections on this page, click **Submit** to generate and display the report. Once the report displays, you have the option to display the report in a variety of formats. If you want to send it to *myReports* as a PDF, click the **Send to myReports** button.

Note: To print the expanded version of the report, expand the data on the SSRS display before clicking Send to myReports

The data on this report may be reviewed and modified before it is transmitted to the state.

FORM 100-R

Human Resources > State Requirements > IN > Form 100-R

Use this page to generate a report and transmittal showing the work site addresses, employment and total compensation of all employees who worked for the city during the calendar year just ended.

Indiana Form 100-R

Load Saved Report

Distribution Group

Override Report Title

Email Group

As of Date

Submit

Save

Save As

Delete

Reset



USER AUTHORIZATIONS

To have the Indiana Form 100-R Report appear on a user's menu, the user needs permission to the Form 100-R security component in Maintenance. To give permission, follow these steps:


1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. Select the user.
3. Click the **Permissions** button.
4. Click the *Show Search* link.
5. In the *Component Name* field, type **Indiana Form 100-R** or any part of the name, such as **form 100** (entry is not case sensitive).
6. Click the **Search** button.
7. In the resulting grid, select the row containing the **Indiana Form 100-R** component.
8. Make sure green check marks appear in the *All* and *Print* columns. If they are not there, click the **Check All** button.
9. Click **Save** to retain the settings.

The new authorization will take effect once the user has logged off and back onto the system.

Field	Description
<i>Load Saved Report</i>	Saves this version of the report as a template for later use. When you click Save , a popup will ask you to name the report. Type the name and click OK . The next time you want to run this report, select its name from the <i>Load Saved Report</i> drop-down, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
<i>Override Report Title</i>	Overrides the default report title (Indiana Form 100-R Report).

Field	Description
<i>Distribution Group</i>	A group of people selected to receive the report in <i>myReports</i> . Click in the field to select from a list of existing groups or click the blue-eye prompt  to create a new distribution group. The report will be sent to <i>myReports</i> for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by e-mail. Click in the field to select from a list of existing groups. To create a new e-mail group, click  .
<i>As of Date</i>	Last date of the calendar year for which data will be gathered and reported.

After making your selections in the fields, click **Submit** to generate and display the report.

 Indiana Form 100-R As of 10/11/18			
Employee	Work Site Address	Duties	Compensation
7621 Ahmed, sana		4044-158-01 - 24Fire Fighter	1,364.00
122 Alcorn, Alma A		3402-190-11 - Patrol Officer/Investigations	6,425.60
79 Alexy, Vaughn J		6442-172-02 - Lead-Greenskeeper	5,128.00
1698 Alpert, Edwin J		1576-258-01 - Application Analyst	5,528.00
509 Alvero, Sarah M		6263-216-05 - Program Assistant III	.00
1453 Amacher, John L	123 Main St, TROY, MI 48084	1515-219-01 - Program Asst III- Finance	5,008.12
323 Arendale, Drew C		6442-163-01 - Greens Superintendent	6,952.40
335 Argudo, Gunner E		5304-221-03 - Project Engineer	7,310.98
176 Arnette, Sebastian J		5555-212-05 - Program Assistant I	2,050.20
226 Aspen, Georgia W		5006-223-05 - Property Maint	5,488.00

The *Duties* column contains each employee's Position description or override job *Title* from Workforce.

The *Compensation* column reports the total compensation paid to the employee during the previous year. Note that while taxable wages or FICA wages per the W-2 would be compensation, they may not reflect the total compensation paid to the employee; for example, employee deductions/contributions to a pension plan or "cafeteria" benefit plan may reduce taxable income but should be reflected in total compensation on the 100-R. Certain types of income may not be FICA taxable and some employees at some units may have wages above the FICA limit. The taxability of various types of income, exceptions, and how they should be reported on the W-2 are also discussed in IRS Publication 15. Regardless of how compensation is reported on the W-2, the 100-R should reflect the TOTAL compensation paid to the employee for the year.

Employee and compensation grand totals are displayed at the end of the report.

To generate a **PDF version** of the same report and have it sent to *myReports*, click the **Send to myReports** button. The transmittal will automatically get sent to myReports.

SAMPLE TRANSMITTAL

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Year	Last	First	Middle	Dept	Street	City	State	Zip	Title	Comp				
2	2018	Ahmed	sana		Fire/Fire Operations					24Fire Flg	1364				
3	2018	Alcorn	Alma	A	Police/Investigations					Patrol Off	6425.6				
4	2018	Alexy	Vaughn	J	Rec/Recreation Facilities/Edinburgh Maintenance					Lead-Gree	5128				
5	2018	Alpert	Edwin	J	Admin/Information Technology					Applicatio	5528				
6	2018	Alvero	Sarah	M	Rec/Recreation Programming/Youth & Family					Program A	0				
7	2018	Amacher	John	L	Finance/Financial Services	123 Main	TROY	MI	48084	Program A	5008.12				
8	2018	Arendale	Drew	C	Rec/Recreation Facilities/Edinburgh Maintenance					Greens Su	6952.4				
9	2018	Argudo	Gunner	E	O&M/Engineering					Project En	7310.98				
10	2018	Arnette	Sebastian	J	O&M/O&M Support Services					Program A	2050.2				
11	2018	Aspen	Georgia	W	Comm Dev/Property Services/Business & Rental Licensing					Property I	5488				
12	2018	Baran	Tatiana	A	Fire/Fire Training					Battalion I	7210.24				
13	2018	Barberi	Alexandrc	A	Fire/Fire Operations					Fire Techr	34.42				
14	2018	Bartley	Tate	M	Police/Investigations/Community Outreach Program					Patrol Off	6129.6				
15	2018	Baskas	Sawyer	M	Rec/Recreation Programming/Zanewood Rec Center					Facility Cc	6894				
16	2018	Bath	Enrique	J	Police/Police Support Services/General Support Services					Support Si	6212.4				

PERF REPORT

Human Resources > State Requirements > IN > PERF Report

Use the Indiana PERF (Public Employees Retirement Fund) Report page to generate a report and transmittal file of the retirement contributions of Indiana public employees.

SETUP

USER-DEFINED FIELDS

This report requires the setup of one deduction and one benefit field in User-Defined Fields. These fields accommodate employee contributions to PERF in the form of payroll deductions and employer contributions in the form of benefits. Category codes then must be added to the deduction and benefit fields.

Contributions to PERF may fall into one of four categories: Mandatory Pre-Tax, Mandatory Post-Tax, Voluntary Pre-Tax or Voluntary Post-Tax.

The following steps show you how to set up the user-defined deduction and benefit fields:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Deduction** from the *Record Type* dropdown.
3. Select **Attributes** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined fields for deductions.
4. Click **New**. The User-Defined Fields popup will open.
5. Complete the fields exactly as follows:

Field	Value
<i>Name</i>	INPERF
<i>Section Header</i>	(optional)
<i>Sequence Number</i>	(optional)
<i>Data Type</i>	Text

Field	Value
<i>Maximum Length</i>	1
<i>Required</i>	(leave unchecked)

- Click **OK**. The *INPERF* field will be added to the *Deduction Attributes* grid on the User-Defined Field List page.
- Select **Benefit** from the *Record Type* dropdown. The page will refresh to show a grid of existing user-defined fields for benefits.
- Repeat step 4 above.
- Repeat step 5 above.
- Click **OK**. The *INPERF* field will be added to the *Benefit Attributes* grid on the User-Defined Field List page.

DEDUCTION AND BENEFIT CATEGORY CODES

- To set up category codes for deductions, navigate to Maintenance > Human Resources > Deductions and Benefits > Deductions. The Deduction List page displays.
- Select (highlight) the row containing the deduction for which you want to add a category code.
- Click the **User-Defined Fields** button. The Deduction Code User-Defined Fields page will display.
- In the *INPERF* field, type the contribution category code. The following table contains the valid codes:

Code	Value
A	Mandatory Pre-Tax
B	Mandatory Post-Tax
C	Voluntary Pre-Tax
D	Voluntary Post-Tax

- Click **Save**.
- Repeat these steps for all appropriate deductions.
- To set up category codes for benefits, repeat steps 1-6 above, navigating instead to Maintenance > Human Resources > Deductions and Benefits > Benefits in step 1.

PERF REPORT FIELDS

Indiana PERF Report

Load Saved Report

Override Report Title

Distribution Group

Email Group

Submission Period

Quarter

1

Year

2018

Create Disk File

☒

Employer Information

Reporting Fund

Agency Number

Employer Department Code

Benefit Groups

Hour Codes

Available Benefit Group(s): 27

CF - Police Clerical-FT

CFLTD - Police Clerical-FT-LTD

CM - Elected Officials

CP - Police Clerical Part Time

EL - Election

EXC FT - FT Exception

FR - Firefighter

FT - Non Union-FT

FTD - Directors-FT

FTDLTD - Directors-FT-LTD

FTF - FT Firefighters

Selected Benefit Group(s): 0

Submit

Reset

Save

Save As

Delete

The following table contains descriptions of the fields on the Indiana PERF Report page:

Field	Description
<i>Load Saved Report</i>	<p>Saves this version of the report as a template for later use.</p> <p>When you click Save, a popup will ask you to name the report. Type the name and click OK. The next time you want to run this report, select its name from the <i>Load Saved Report</i> dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report.</p> <p>You may save as many templates as you would like.</p>
<i>Override Report Title</i>	Overrides the default report title (Indiana PERF Report).
<i>Distribution Group</i>	A group of people selected to receive the report in <i>myReports</i> . Click in the field to select from a list of existing groups or click the blue-eye prompt to create a new distribution group. The report will be sent to <i>myReports</i> for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by e-mail. Click in the field to select from a list of existing groups.

Field	Description
<i>Quarter</i>	Required. Identifies the fiscal quarter being reported. The available selections are 1 (Jan.-Mar.), 2 (Apr.-June), 3 (July-Sept.) and 4 (Oct.-Dec.).
<i>Year</i>	Required. Identifies the year of the fiscal quarter being reported. Type all four digits of the year. The current year is the default.
<i>Taxable Wage Limit</i>	Required. Taxable wage dollar limit for which to run the report.
<i>Create Disk File</i>	Determines whether a transmittal file of the same PERF data will be generated with the report. Check this box to generate the file. If this box is checked, entries are required for the <i>Reporting Fund</i> , <i>Agency Number</i> and <i>Employer Department Code</i> .
<i>Reporting Fund</i>	Employer's reporting fund, agency number and department code for the report. If <i>Create Disk File</i> is checked, these entries are required. For <i>Reporting Fund</i> , the valid range is 1-99 , for <i>Agency Number</i> 1-9999999 , for <i>Employer Department Code</i> 1-999 .
<i>Agency Number</i>	
<i>Employer Department Code</i>	
<i>Benefit Groups and Hours Codes</i>	Select one or more benefit groups from the <i>Available Benefit Group(s)</i> list box and one or more hours codes from the <i>Available Hours Code(s)</i> list box. Only employees associated with these benefit groups and hours codes will be included in the report.

REPORT OUTPUT

The report output provides users with data detailing each employee's PERF contributions, including mandatory and voluntary pre-tax and post-tax contributions. Use this report as a guide for preparing the Indiana PERF Report. Data on the report is sorted by *Department*, followed by *Position*.

INDIANA RETIREMENT REPORT

The following user-defined fields are required for Indiana Retirement reporting:

Record Type	Name	Data Type	Values		
Employee Employment	<i>IN Credited Days</i>	Numeric	-99.00	999	Only used when the Submission Unit Fund is TRF for Teachers Retirement Fund
Employee Employment	<i>IN Last Day in Covered Position</i>	Date			
Employee Employment	<i>IN Submission Unit Fund</i>	Validation Set (404)	Expected values: PERF, TRF, PA, JU, 77 or CD		

INDIANA SYSTEM SETTINGS MAINTENANCE

Human Resources > State Requirements > IN > System Settings Maintenance

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana System Settings Maintenance

Retirement Settings

General | Benefits | Deductions | Earnings

Submission Funds

Submission Fund	Unit Number
PERF	0550000
Submission Unit	
TRF	0099012

FSP Funds

Available Funds: 0

001 - General Fund
002 - General Fund-Golf
003 - General Fund-Aquatics
111 - Block Grant Fund
112 - CDBG Renaissance Grant
113 - Community Development
122 - Enterprise Community
124 - Renaissance Alliance
125 - Economic Opportunity Grant
131 - Home Funding
150 - Affordable Housing
151 - Section 8 Housing Vouchers
171 - Management Services
191 - Revolving Fund
210 - Supplemental Pay Fund

Selected Funds: 91

Use this page to perform the setup needed to create your retirement data. Setup includes the mapping of submission funds to unit numbers, the selection of FSP funds, the mapping of benefit and deduction codes to contribution types, and the flagging of hours codes as excluded or severance.

The page is segmented into four tabs: **General**, **Benefits**, **Deductions** and **Earnings**. You may click **Save** after selections have been made on each tab or wait until selections have been made on all tabs.

GENERAL

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana System Settings Maintenance

Retirement Settings

General | Benefits | Deductions | Earnings

Submission Funds

Submission Fund	Unit Number
PERF	0550000
Submission Unit	
TRF	0099012

FSP Funds

Available Funds: 0

Selected Funds: 91

- 001 - General Fund
- 002 - General Fund-Golf
- 003 - General Fund-Aquatics
- 111 - Block Grant Fund
- 112 - CDBG Renaissance Grant
- 113 - Community Development
- 122 - Enterprise Community
- 124 - Renaissance Alliance
- 125 - Economic Opportunity Grant
- 131 - Home Funding
- 150 - Affordable Housing
- 151 - Section 8 Housing Vouchers
- 171 - Management Services
- 191 - Revolving Fund

General is the default tab.

For each *Submission Fund*, fill in the applicable seven-digit *Unit Number* identifying the retirement data submission.

As shown below, *IN Submission Unit Fund*, the user-defined field (UDF) that appears on each employee's **Employment** tab in Workforce Administration, identifies the employee as belonging to **PERF** or **TRF**:

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Employee Search
Butler, Jaden III (323)

07/01/1990

Personal **Employment** Jobs Payroll Data Contracts Employer Reporting

Save Cancel Employment

Effective Date 07/01/1990

Status Information

Status Active
Status Event New Hire
Event Reason
Employment Type Full Time
Employment Class Non-Exempt
EEOC Full-time
Company 1099

Date Selection

Hire Date 08/07/1986
Benefit Date 07/01/1990
Accrual Date 07/01/1990
Seniority Date 08/07/1986
Seniority Rank
Termination Date
IMP Start Date

User Defined Fields

IN Submission Unit PERF
Fund

When you create your data, you may create it for **PERF** employees only, **TRF** employees only or both types of employees.

Use the **FSP Funds** multi-select list boxes to report wages paid as Federally Supported Programs (FSP) separately from other wages in the wage and contribution process.

The *Available Funds* list box contains the codes and descriptions of all FSP funds available for selection. To select FSP funds for reporting, move them from *Available* box to the *Selected* box, as shown below:

FSP Funds

Available Funds: 9

Selected Funds: 82

Note: To set up FSP funds, navigate to Maintenance > New World ERP Suite > Chart of Accounts > Funds.

BENEFITS AND DEDUCTIONS

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana System Settings Maintenance

Retirement Settings

General **Benefits** Deductions Earnings

Benefit Code	Type
▼ Contains...	
nnualPercent - Test Annual Percent	
nnCred - BenCred	
3 Health Plan - BG Health Plan	
jdget CERS - CERS for Position Budgeting	
jdget CERS/HAZ - CERS/HAZ for Position Budgeting	
jdget Dental - Budget Dental	
jdget Medical - Budget Medical 400	
jdget Term Life - Budget Term Life	
jdget Unemploy - Budget Unemployment Insurance	
jdget Vision - Budget Vision	
ERS HAZ Incent - CERS HAZ Incentive-Fire	
ERS Haz Ret - CERS Hazardous Retirement	Employer Share
ERS HAZ-Incent - CERS HAZ-Incentive for Police	
ERS NH Inct F - CERS Non-Haz Incentive Fire	
ERS NH Inct P - CERS Non-Haz Incentive Police	
ERS Ret - CERS Retirement	Employer Share
EF COMP - DEF COMP	
ental- - Dental Ins 09	
ental- - Humana Dental Ins	

Save Refresh Menu

Use the **Benefits** and **Deductions** tabs to map benefit and deduction codes to the appropriate contribution types.

The grid on the **Deductions** tab contains all deduction codes and associated contribution type codes. The grid on the **Benefits** tab contains all benefit codes and associated contribution type codes.

To associate a deduction or benefit code with a contribution type, double-click in the corresponding *Contribution Type* cell, and select the contribution type you want from the drop-down.

To save each selection, click outside the cell, or click the **Save** button:

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana System Settings Maintenance

Retirement Settings

General
Benefits
Deductions
Earnings

Deduction Code	Type
Contains...	
ANNUAL RATE STEP - Annual Rate Step	
anCred - BenCred	
3 Health Plan - BG Health Plan	
entral Life - Central United Life Ins	
ERS Add Haz - CERS Additional Haz > 9/1/08	Member Voluntary Pre-Tax
ERS Add Non-Haz - CERS Additional Non-Haz > 9/1/08	Member Voluntary Pre-Tax
ERS INST (POST) - CERS Installment Post Tax	
ERS INST (PRE) - CERS Installment Pre Tax	
ERS Ret - CERS Non-Hazardous	Mandatory Pre-Tax
ERS/HAZ Ret - CERS Hazardous	Severance Mandatory Pre-Tax
ild Flex - Child Care Flex Spending	
ild Support - Child Support Kentucky	
lonial Ins - Colonial Insurance Pre-Tax	
lonial Life - Colonial Life Insurance Post-Tax	
EF COMP - DEF COMP	Member Voluntary Pre-Tax
ental - Dental Ins 09	
ental - Humana Dental Ins	
pendant Care - Dependent Care Flex Spending	

Save
Reset
Retirement List

The selections available in the *Type* drop-downs come from validation set 630-Indiana Retirement Contribution Type. To view or update the validation set from the grid, double-click in a *Type* cell, press **<Ctrl>** and click in the cell:

Validation Set Values List - 630 Indiana Retirement Contribution Type	
Value	Description
Contains...	Contains...
Employer Share	Employer Share
FSP	FSP - Federally Supported Program
HEP	HEP - Higher Education Program
Mandatory Post	Mandatory Post-Tax
Mandatory Pre	Mandatory Pre-Tax
Member Voluntary Post	Member Voluntary Post-Tax
Member Voluntary Pre	Member Voluntary Pre-Tax
Severance Employer Share	Severance Employer Share
Severance Mandatory Post	Severance Mandatory Post-Tax
Severance Mandatory Pre	Severance Mandatory Pre-Tax
Severance Member Voluntary Post	Severance Member Voluntary Post-Tax
Severance Member Voluntary Pre	Severance Member Voluntary Pre-Tax

1 - 12 of 12 records
Prev
1
Next
Show 50 records

New
Delete
Refresh
Close

Note: Validation sets already have been set up for you at Maintenance > New World ERP Suite > System > Validation Sets > Validation Set List.

If you select a contribution type by mistake, click the **X** on the right side of the cell to remove it from the cell.

Each deduction or benefit code that needs to be included in the contributions must have a contribution type to go with it.

The following contribution types are available on the drop-down:

- ***Employer Share***
- ***FSP-Federally Supported Program***
- ***HEP-Higher Education Program***
- ***Mandatory Post-Tax***
- ***Member Voluntary Post-Tax***
- ***Member Voluntary Pre-Tax***
- ***Severance Employer Share***
- ***Severance Mandatory Post-Tax***
- ***Severance Mandatory Pre-Tax***
- ***Severance Member Voluntary Post-Tax***
- ***Severance Member Voluntary Pre-Tax***

Each contribution type may be associated with more than one deduction or benefit code.

EARNINGS




myFavorites | Financial Management | Human Resources | Utility Management | Community Development |

Indiana System Settings Maintenance

Retirement Settings



General | Benefits | Deductions | **Earnings**

Hours Code	Excluded	Severance
AAA Test - 4A Testing Inactive		✓
AABBCCDD - Test Pay Code		✓
ABC - ABCDEF		✓
Admin Leave - Admin Leave Edited		✓
Admin Leave P/T - Administrative Leave P/T		✓
Admin OT - Admin Leave OT		✓
App Day OT - Appreciation Day OT Rate		✓
Appr Day Payout - Appreciation Day Payout		✓
Appr Day Used - Appreciation Day Used		✓
Appreciation Day - Appreciation Day Earned		
Auto Benefit - Taxable Vehicle		✓
Bonus - Fire OT - Bonus Used - Fire OT	✓	
Bonus Earned - Bonus Time Earned	✓	
Bonus F/T Used - Bonus Time Used Full Time		
Bonus P/T Used - Bonus Time Used Part Time		
Bonus Payout - Bonus Payout		

 Save  Reset  Retirement List

Use the **Earnings** tab to flag hours codes as *Excluded* from Indiana retirement or as *Severance*.

Excluded hours will exclude from pensionable wages only.

Note: To navigate back and forth from system settings page to the Indiana Retirement List page while performing setup and running reports, use the **Retirement List** button  on this page and the **Settings** button  on the retirement list page.

INDIANA RETIREMENT LIST

Human Resources > State Requirements > IN > Retirement List

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana Retirement List

Employee #	Employee Name	Submission Fund	Earnings	Contributions	FSP Earnings	FSP Contributions	Credited Days
<input type="checkbox"/> 2638	Agatha, Savannah S	PERF	\$3,082.29	\$745.29	\$3,082.29	\$745.29	10
<input type="checkbox"/> 390	Auther, Nia Jr	PERF	\$1,637.95	\$396.06	\$1,637.95	\$396.06	10
<input type="checkbox"/> 3193	Beckes, Heather	TRF	\$1,516.68	\$381.90	\$1,516.68	\$381.90	10
<input type="checkbox"/> 323	Butler, Jaden III	PERF	\$2,120.14	\$512.65	\$2,120.14	\$512.65	10
<input type="checkbox"/> 2624	Grosser, Tyson N	TRF	\$2,235.23	\$540.48	\$2,235.23	\$540.48	10

1 - 5 of 5 records

Create New Print Delete Settings

Use the Indiana Retirement List page to review and modify retirement data for each employee within the organization, create new data and generate a report and transmittal file of the data. The transmittal file may be submitted to the state each pay period.

The grid on this page contains retirement data from the last time the work file was created, with each row in the grid corresponding to an employee record. If you are running this process for the first time, the grid will be empty.

Each row of the grid corresponds to an employee record within a system and contains the employee's submission fund, earnings, contributions, FSP earnings, FSP contributions and credited days.

To delete a row from the grid, select the row, and click the **Delete** button, located in the bottom border of the grid.

To edit data for an employee, click the *Employee* name in the Indiana Retirement List. To add an employee to the Indiana Retirement List, click the **New** button, select the *Employee* from the drop-down on the Add Employee dialog (the drop-down contains all employees who have selections in the *IN Submission Fund* UDF in Workforce), and click **Ok**. In either instance, the Indiana Retirement Entry page opens:

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana Retirement List

Indiana Retirement Entry - Butler, Jaden III

General | Earnings | Contributions

Title Submission Unit Fund

First Name Pay Period Start Date

Middle Name Pay Period End Date

Last Name Last Day In Covered Position

Suffix Last Day In Pay

Pension ID Last Check Date

Credited Days

The employee's general information, earnings and contributions appear on three separate tabs.

On the **General** tab, the pay period dates from the create process and fields containing data from Workforce are disabled.

Use the *Last Day in Pay* and *Last Check Date* fields for a terminated employee.

If credited days for the employee should be something different from the *Default Credited Days* entered in the create retirement data process (next section) or the *IN Credited Days* UDF in Workforce Administration, enter the number in the *Credited Days* field.

The **Earnings** and **Contributions** tabs contain grids showing the employee's earning and contribution types and corresponding amounts in individual rows:

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Indiana Retirement List

Indiana Retirement Entry - Agatha, Savannah S

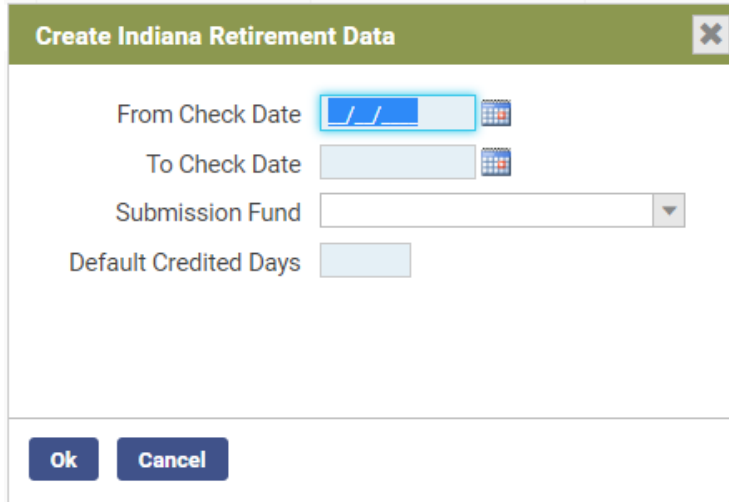
General | Earnings | Contributions

Contribution Type	Amount
<input type="text" value="Employer Share"/>	\$356.68
<input type="text" value="Mandatory Pre-Tax"/>	\$92.98

Note: When you are adding an employee to the Indiana Retirement List, the **Earnings** and **Contributions** tabs remain disabled until you have selected the pay period start and end dates and clicked **Save**.

CREATE RETIREMENT DATA

To create a new file of retirement data, click the **Create** button, located in the bottom border of the grid. (If data already exists, a pop-up lets you know and gives the option to continue.) The Create IN Retirement Data dialog opens:



The dialog box titled "Create Indiana Retirement Data" contains the following fields:

- From Check Date:** A date picker field with a calendar icon.
- To Check Date:** A date picker field with a calendar icon.
- Submission Fund:** A dropdown menu.
- Default Credited Days:** A text input field.

At the bottom are "Ok" and "Cancel" buttons.

Select a *From Check Date* and *To Check Date*.

In the *Submission Fund* field, select whether to create data for **PERF** or **TRF** employees only, or leave the field blank to create data for all PERF and TRF employees.

Fill in the *Default Credited Days*. If you have created a *Credited Days* UDF for the **Employment** tab in Workforce Administration, an entry in that field overrides the one here.

REPORT RETIREMENT DATA

To generate the Indiana Retirement Report and transmittal file containing the latest retirement data, click the **Print** button, located in the bottom border of the grid on the Indiana Retirement List page. You may print a summarized or detailed report with PERF employees only, TRF employees only or both.

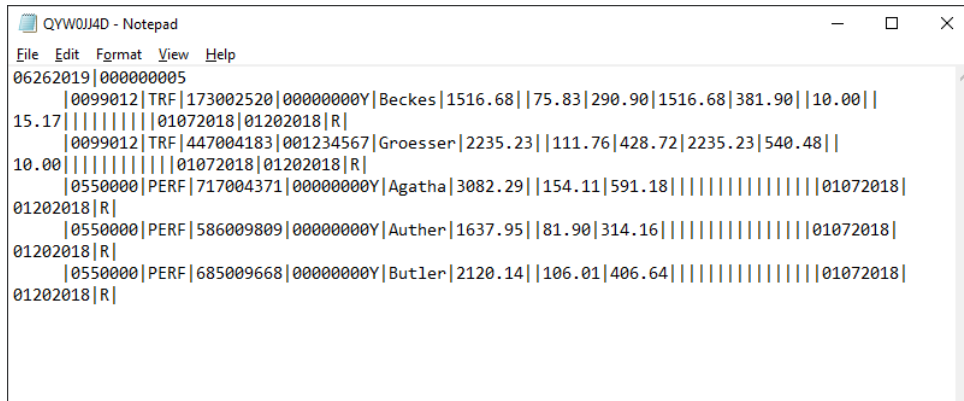
After generating, the report and transmittal file are sent to myReports, the report as a PDF, the transmittal file as a text file.

SAMPLE INDIANA RETIREMENT REPORT (SUMMARY)



Indiana Retirement Listing						
6/26/2019						
Report Type - Summary						
Employee	Submission Fund	Earnings	Contributions	FSP Earnings	FSP Contributions	Credited Days
2638 Agatha, Savannah S	PERF	3,082.29	745.29	3,082.29	745.29	10.00
390 Auther, Nia Jr	PERF	1,637.95	396.06	1,637.95	396.06	10.00
3193 Beckes, Heather	TRF	1,516.68	381.90	1,516.68	381.90	10.00
323 Butler, Jaden III	PERF	2,120.14	512.65	2,120.14	512.65	10.00
2624 Groesser, Tyson N	TRF	2,235.23	540.48	2,235.23	540.48	10.00
Total Employees 5		10,592.29	2,576.38	10,592.29	2,576.38	50.00

SAMPLE INDIANA RETIREMENT TRANSMITTAL FILE

To view the transmittal file, click the Indiana Retirement Transmittal File in myReports. A **.txt** button displays in the bottom-left border of the page. Click this button to view or save the file:



```
QYW0JJ4D - Notepad
File Edit Format View Help
06262019|000000005
|0099012|TRF|173002520|00000000Y|Beckes|1516.68||75.83|290.90|1516.68|381.90||10.00|
15.17|||||||01072018|01202018|R|
|0099012|TRF|447004183|001234567|Groesser|2235.23||111.76|428.72|2235.23|540.48||
10.00|||||||01072018|01202018|R|
|0550000|PERF|717004371|00000000Y|Agatha|3082.29||154.11|591.18|||||||01072018|
01202018|R|
|0550000|PERF|586009809|00000000Y|Auther|1637.95||81.90|314.16|||||||01072018|
01202018|R|
|0550000|PERF|685009668|00000000Y|Butler|2120.14||106.01|406.64|||||||01072018|
01202018|R|
```

Note: To navigate back and forth from retirement list page to the Indiana System Settings Maintenance page while performing setup and running reports, use the **Settings** button  on retirement list page and the **Retirement List** button  on the system settings page.

QUARTERLY TAX AND WAGE REPORT

Human Resources > State Requirements > IN > Quarterly Tax and Wage Report

Use the Indiana Quarterly Tax and Wage Report page to generate a report and transmittal file of quarterly tax and wage information to be filed with the state of Indiana each quarter.

SETUP

SEASONAL INDICATOR FIELD

This report requires a seasonal indicator field to be set up in User-Defined Fields and applied to employee records. A seasonal indicator is assigned by the State of Indiana to an employer when seasonal wages are involved.

The following steps show you how to set up the seasonal indicator field:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Employee Employment** from the *Record Type* drop-down.
3. Select **Attributes** from the *Maintenance Type* drop-down. The page will refresh to show a grid of existing user-defined fields for employees.
4. Click **New**. The User-Defined Fields popup will open.
5. Complete the fields exactly as follows:

Field	Value
<i>Name</i>	<i>Seasonal</i>
<i>Section Header</i>	(optional)
<i>Sequence Number</i>	(optional)
<i>Data Type</i>	<i>Text</i>
<i>Maximum Length</i>	2
<i>Required</i>	(leave unchecked)

6. Click **OK**. The *Seasonal* field will be added to the *Employee Attributes* grid on the User-Defined Field List page.

EMPLOYEE

1. Navigate to Human Resources > Workforce Administration > Search. The Employee Search page displays.
2. Use the fields on this page to search for the employee for whom you want to add the seasonal indicator. Use as many fields as you need to narrow the search or leave them all blank to produce a list of all employees. You also may search for all employees of a particular status, department or benefit group.

3. Click the **Search** button. The search results display under the search fields.
4. In the list of results, click the *Employee Number* of the employee whose record you want to display. The employee's Workforce page will display.
5. Select the **Employment** tab.
6. Click the **Edit** button.
7. In the *Seasonal* field, fill in the value assigned by the State of Indiana. The seasonal indicator must be a two-digit number. If the number is 0-9, the first digit must be zero filled (01, 02, 03).
8. Click **Save**.

QUARTERLY TAX AND WAGE FIELDS

Indiana Quarterly Tax And Wage Report

Load Saved Report

Override Report Title

Distribution Group

Email Group

Submission Period

Transmitter Information

Quarter

1

Year

2018

Taxable Wage Limit

Create Disk File

☐

Exclude Zero Gross Wages

☐

Contact Name

Contact Phone

SUTA Number

Benefit Groups

Hour Codes

Available Benefit Group(s): 27

CF - Police Clerical-FT

CFLTD - Police Clerical-FT-LTD

CM - Elected Officials

CP - Police Clerical Part Time

EL - Election

EXC FT - FT Exception

FR - Firefighter

FT - Non Union-FT

FTD - Directors-FT

FTDLTD - Directors-FT-LTD

FTF - FT Firefighters

Selected Benefit Group(s): 0

Print

Reset

Save

Save As

Delete

The following table contains descriptions of the fields on the Indiana Quarterly Tax and Wage Report page:

Field	Description
<i>Load Saved Report</i>	<p>Saves this version of the report as a template for later use.</p> <p>When you click Save, a popup will ask you to name the report. Type the name and click OK. The next time you want to run this report, select its name from the <i>Load Saved Report</i> dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report.</p> <p>You may save as many templates as you would like.</p>
<i>Override Report Title</i>	Overrides the default report title (Indiana Quarterly Tax and Wage Report).

Field	Description
<i>Distribution Group</i>	A group of people selected to receive the report in <i>myReports</i> . Click in the field to select from a list of existing groups or click the blue-eye prompt to create a new distribution group. The report will be sent to <i>myReports</i> for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by e-mail. Click in the field to select from a list of existing groups.
<i>Quarter</i>	Required. Identifies the fiscal quarter being reported. The available selections are 1 (Jan.-Mar.), 2 (Apr.-June), 3 (July-Sept.) and 4 (Oct.-Dec.).
<i>Year</i>	Required. Identifies the year of the fiscal quarter being reported. Type all four digits of the year. The current year is the default.
<i>Taxable Wage Limit</i>	Required. Taxable wage dollar limit for which to run the report.
<i>Create Disk File</i>	Determines whether a transmittal file of the same tax and wage data will be generated with the report. Check this box to generate the file. If this box is checked, entries are required for the <i>Contact Name</i> , <i>Contact Phone</i> and <i>Insurance Account Number</i> .
<i>Contact Name</i>	Transmitter's contact name. If <i>Create Disk File</i> is selected, this entry is required.
<i>Contact Phone</i>	Transmitter's contact phone number. If <i>Create Disk File</i> is selected, this entry is required.
<i>Insurance Account Number</i>	Transmitter's state unemployment insurance account number. If <i>Create Disk File</i> is selected, this entry is required. The State of Indiana assigns this number to the employer. The first 6 positions are numeric; the seventh position is alphabetic or blank.
<i>Benefit Groups and Hours Codes</i>	Select one or more benefit groups from the <i>Available Benefit Group(s)</i> list box and one or more hours codes from the <i>Available Hours Code(s)</i> list box. Only employees associated with these benefit groups and hours codes will be included in the report.

REPORT OUTPUT

The report output provides users with data detailing each employee's quarterly wages and the employer's quarterly wages and withholdings. The report also displays F.E.I. (Federal Employer Identification) exempt and taxable wages.

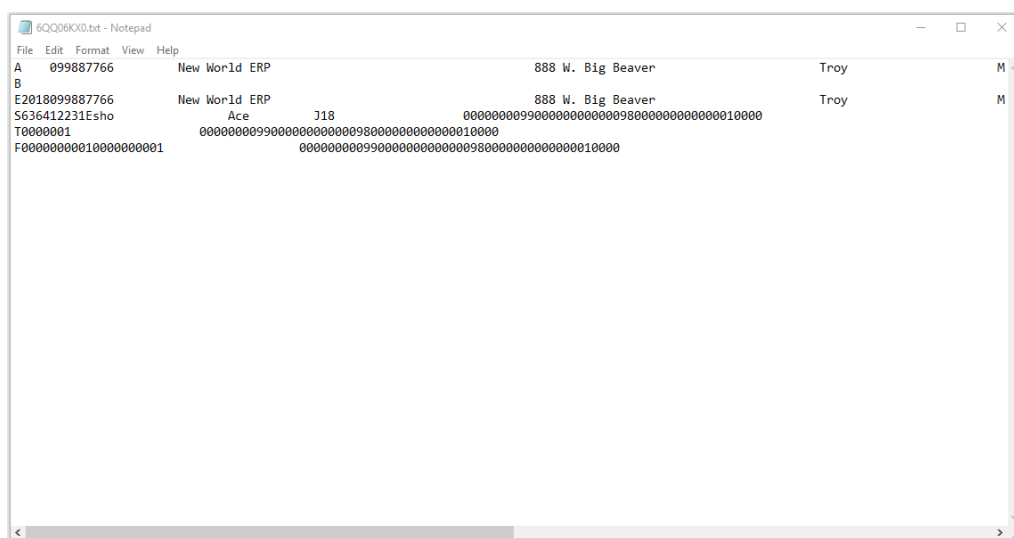
Use this report as a guide for preparing the Indiana Quarterly Tax and Wage Report. Data on the report is sorted by *Name*.



Indiana Quarterly Tax And Wage Report

Check Date Range 01/01/18 - 03/31/18

Employee	SSN	Quarterly Wages	YTD Wages	Excess Wages	Taxable Wages
2232 Esho, Ace J	636-41-2231	9,900.00	9,900.00	9,800.00	100.00
Grand Totals	Employees 1	\$9,900.00	\$9,900.00	\$9,800.00	\$100.00
Number of Employees in Month 1 0					
Number of Employees in Month 2 0					
Number of Employees in Month 3 0					



NEW HIRE REPORT

Human Resources > State Requirements > IN > New Hire Report

Use this page to generate the Indiana New Hire Report and transmittal file that provide information on employees who have been hired or rehired within selected date ranges.

PERMISSIONS

For the option to appear on the menu, each user needs permission to the **Indiana New Hire Report** security component:

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
2. Select the user's row.
3. Click **Permissions**. The User Permissions page opens, containing a grid of security components and a filter panel.

4. In the *Search Security Components* filter, type Indiana **New Hire Report** (the entry is not case sensitive). The grid refreshes to contain the **Indiana New Hire Report security component** only.
5. Select *Full* permission.
6. Click **Save**.
7. For the permission to take effect, the user needs to log off and log back onto the system.

FIELDS

Indiana New Hire Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

New Hire Information

From Date

To Date

Rehire/Recall Employment Information

Effective From Date

Effective To Date

Employee Status Event

DE - Deceased
FMLA - FMLA
FT to PT - Full Time to Part Time Employee
JUR - Jury Duty
LO - Layoff
ML - Military Leave
NB - Non Benefited Employee
NE - New Hire
PE - PERA Eligible - Seasonal
PO - PERA Eligible - over 6 months
PT to FT - Part Time to Full Time Employee
Q - Quit
RE - Reinstated

Available: 22

Selected: 0

Submit

Save


Save As

Delete

Reset

<i>Load Saved Report</i>	Saves this version of the report as a template for later use. When you click Save , a dialog will ask you to name the report. Type the name and click OK . The next time you want to run this report, select its name from the Load Saved Report drop-down, and the fields will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
<i>Override Report Title</i>	Overrides the default report title, (Indiana New Hire Report).
<i>Distribution Group</i>	A group of people selected to receive the report in myReports. Click in the field to select from a list of existing groups or click the blue-eye prompt to create a new distribution group. The report will be sent to myReports for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by email. Click in the field to select from a list of existing groups. To create a new email group, click.

41/43


new world
a tyler erp solution

<i>From Date</i>	Required. Date range within which employee new hire information is captured. The report will include all employees who have hire dates and employee status events that fall within this period. You may use the calendar prompts to select the dates.
<i>To Date</i>	
<i>Effective From Date</i>	Date range within which employee rehire/recall information is captured. Employees who have not been paid in the last 60 days before being paid as rehired or recalled employees within the effective date range selected will appear on the report.
<i>Effective To Date</i>	
<i>Employee Status Event</i>	Employee status events to be included on the report. Select status events by moving them from the Available list box to the Selected list box. For every status event selected, the report will include the employees who had an employment effective date within the date range selected, were paid within the same date range and were not paid at least 60 days prior. The available status events come from validation set 368-Employee Status Event (Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List).

After making your selections on this page, click **Submit** to generate and **display** the report.

<div> <div> <div>1 of 1</div> <div>Find Next</div> </div> <div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> </div>				
		Indiana New Hire Report Date Range 01/01/18 - 12/31/18		
Employer Name New World ERP Federal EIN 09-9887766		Address 888 W. Big Beaver Suite 600 Troy, MI 48084		
<u>SSN</u>	<u>Employee Name</u>	<u>Employee Address</u>	<u>Date Of Birth</u>	<u>Date Of Hire</u>
987-65-4321	Belle, LuLu	1211 N Maple St, ORION, MI 48362	10/24/1990	08/27/2018
122-21-2121	Miller, Sally	1211 N Maple, Lake Orion, MI 48362	02/14/1995	09/28/2018
867-53-0955	Montana, Tony	840 W Long Lake, Troy, MI 48098	06/22/1966	09/13/2018
568-44-4444	TwentyTwo, TwentyOne	1211 N Maple St, ORION, MI 48362	10/24/1985	04/01/2018
125-46-7861	Wayne, Bruce	1007 Mountain Drive, Gotham, NY 53540	06/24/1973	05/03/2018
Grand Total Employees 5				
Run by NWS on 10/11/2018 15:32:20 PM			Page 1 of 1	

A **transmittal file** of the report data also will be sent to *myReports*.

6QQ06KX1.txt - Notepad

File Edit Format View Help

IN Newhire Record1.00LuLu	Belle	9876543211211 N Maple St
IN Newhire Record1.00Sally	Miller	1222121211211 N Maple
IN Newhire Record1.00Tony	Montana	867530955840 W Long Lake
IN Newhire Record1.00TwentyOne	TwentyTwo	5684444441211 N Maple St
IN Newhire Record1.00Bruce	Wayne	1254678611007 Mountain Drive