LOGOS®.NET

Public Administration Software

Arizona State Requirements

User Guide

New World Systems®
The Public Sector Software Company

Contents

1

REPORT SETUP

Overview

This chapter provides information on setting up the user-defined fields necessary to processing Arizona State Requirement Reports.

1 "User Defined Fields Setup" on page 1-2 details how to set up benefit, deduction, and hours code as user-defined fields necessary to run the Arizona Retirement report.

User Defined Fields Setup

The Arizona Retirement Report requires that deductions, benefits, and employee fields are set up in User-Defined Fields. These fields accommodate contributions made by employees, in the form of payroll deductions, or employers, in the form of benefits. Then category codes must be added to the deduction and benefit fields. Contributions depend on the plan to which the employee belongs.

Setting Up Deductions

To set up **deduction** user-defined fields for the Arizona Retirement Report:

1 From the **Maintenance** menu, select **Logos Suite** > **Security** > **User-Defined Fields**. The "User-Defined Field" page displays.

2 Select Deduction from the **Record Type** control.

3 Click the **New** button. The "User-Defined Fields" popup displays.

4 Complete the fields *exactly* as follows:

Table 1.1

Control	Value
Name	ASRS
Data Type	Text
Maximum Length	3
Required	Unselected

5 Click **OK**.

To set up category codes for **deductions**:

1 From the **Maintenance** menu, select **Human Resources** > **Deductions and Benefits** > **Deductions**. The "Deduction List" page displays.

2 Highlight the row of the deduction in the list for which you want to add a category code.

3 Click the **User Defined Fields** button. The "Deduction Code User Defined Fields" page displays.

4 Click the ASRS row in the table to highlight it. Click it again to put the row in EDIT mode.

5 Enter the appropriate value as needed for the codes:

Table 1.2

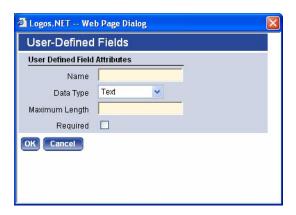| Value	Meaning
R	Normal retirement contribution.
P01	Voluntary deduction plan, contract 1.
P02	Voluntary deduction plan, contract 2.
P03	Voluntary deduction plan, contract 3.
S01	Voluntary deduction system, contract 1.
S02	Voluntary deduction system, contract 2.
S03	Voluntary deduction system, contract 3.

6 Click **Save**.

7 Repeat Steps 2-6 for the remainder of the deductions for which you want to add a category code.

Setting Up Benefits

To set up **benefit** user-defined fields for the Arizona Retirement Report:

1   From the **Maintenance** menu, select **Logos Suite** > **Security** > **User-Defined Fields**. The "User-Defined Field List" page displays.

2   Select Benefit from the **Record Type** control.

3   Click the **New** button. The "User-Defined Fields" popup displays.

4   Complete the fields *exactly* as follows:

Table 1.3

Control	Value
Name	ASRS
Data Type	Text
Maximum Length	3
Required	Unselected

5   Click **OK**.

To set up category codes for **benefits**:

1   From the **Maintenance** menu, select **Human Resources** > **Deductions and Benefits** > **Benefits**. The "Benefit List" page displays.

2   Highlight the row of the benefit in the list for which you want to add a category code.

3 Click the **User Defined Fields** button. The "Benefit Code User Defined Fields" page displays.

4 Click the ASRS row in the table to highlight it. Click it again to put the row in EDIT mode.

5 Enter the appropriate value as needed for the codes:

Table 1.4

Value	Meaning
R	Normal retirement contribution.
P01	Voluntary deduction plan, contract 1.
P02	Voluntary deduction plan, contract 2.
P03	Voluntary deduction plan, contract 3.
S01	Voluntary deduction system, contract 1.
S02	Voluntary deduction system, contract 2.
S03	Voluntary deduction system, contract 3.

6 Click **Save**.

7 Repeat Steps 2-6 for the remainder of the benefits for which you want to add a category code.
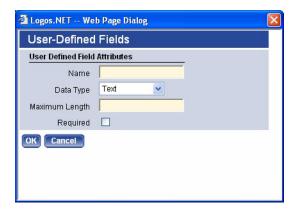
Setting Up Employees

To set up an ASRS employee user-defined field for the Arizona Retirement Report,

1 From the **Maintenance** menu, select **Logos Suite** > **Security** > **User-Defined Fields**. The "User-Defined Field" page displays.

2 Select Employee from the **Record Type** control.

3   Click the **New** button. The "User-Defined Fields" popup displays.

4   Complete the fields *exactly* as follows:

Table 1.5

Control	Value
Name	ASRS
Data Type	Text
Maximum Length	1
Required	Unselected

5   Click OK. This sets up the user-defined fields for employees who use the normal retirement contribution option.

6   User-defined fields must also be set up for employees who use contract options for voluntary deductions. Click **New**.

7   Complete the fields *exactly* as follows:

Table 1.6

Control	Value
Name	ASRSContract01
Data Type	Numeric
Minimum Value	1
Maximum Value	99999999
Required	Unselected

8   Click **OK**.

9   Repeat Steps 3 through 5 to add user-defined fields named ASRSContract02 and ASRSContract03. All other parameters besides the name are unchanged.

To add ASRS to employee:

1   From the **Human Resources** menu, select **Human Resources** > **Employee Maintenance**. The "Employee List" page displays.

2   Use the Search controls to find the employee for whom you want to add an
    ASRS group.

3   Click the *Employee Number* hyperlink for the employee on which you per-
    formed the search.

4   Select User Defined in the *Attribute* control.

5   If the employee uses the normal retirement contribution, click on the ASRS
    row. Click it again to put the row in EDIT mode.

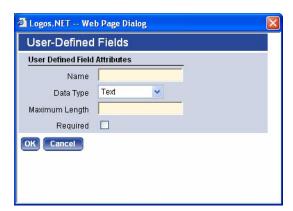6   Enter the appropriate value for the following codes:

Table 1.7

Value	Meaning
Y	The employee applies to ASRS.

7   Click **Save**.

8   If the employee uses any of the contract plans, click on the appropriate
    ASRSContract row. Click on it again to put the row in EDIT mode.

9   Enter the 8-digit number of the contract.

10 Click **Save**.

Setting Up Hours Codes

To set up **hours codes** user-defined fields for the ASRS Retirement Report:

1   From the **Maintenance** menu, select **Logos Suite** > **Security** > **User-
    Defined Fields**. The "User-Defined Field" page displays.

2   Select Hours Code from the **Record Type** control.

3   Click the **New** button. The "User-Defined Fields" popup displays.

4   Complete the fields *exactly* as follows:
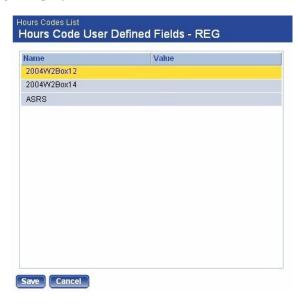
Table 1.8

Control	Value
Name	ASRS
Data Type	Text

Table 1.8

Control	Value
Maximum Length	1
Required	Unselected

5 Click **OK**.

To set up category codes for **hours codes**:

1 From the **Maintenance** menu, select **Human Resources** > **Earnings Maintenance** > **Hours Codes**. The "Hours Codes List" page displays.

2 Highlight the row of the hour code in the list for which you want to add a pension category code.

3 Click the **User Defined Fields** button. The "Hour Code User Defined Fields" page displays.

4 Click the ASRS row in the table to highlight it. Click it again to put the row in EDIT mode.

5 Enter the appropriate value as needed for the codes:

Table 1.9

Value	Meaning
N	Do not include wages for this hours code in the wage column of the report or the text file. If this is blank, the wages will be included.

6 Click **Save**.

7 Repeat Steps 2-6 for the remainder of the hours codes for which you want to add a pension category code.

REPORTS

Overview

This chapter provides detailed window and field information for Arizona state requirement reports. Use these reports as guides for state remittances. For more information about these remittances, please refer to the following Web site:

➧ http://www.state.az.us

NOTE:

The reports described in this chapter require that benefit groups and hour codes are set up in Human Resources Maintenance.

1 "Arizona Retirement Report (ASRS)" on page 2-2 allows authorized users to print a listing of employer and employee contributions for employees in the retirement plan.

2 "PSPRS Report" on page 2-5 enables authorized users to select the information that appears on the Arizona Retirement Report and submit it to **myReports**.

Arizona Retirement Report (ASRS)

The "Arizona Retirement Report (ASRS)" page, accessed from the Human Resources menu (**Human Resources> State Requirements> AZ> Arizona Retirement Report**), is used to print a listing of employer and employee contributions for employees in the retirement plan.

Entry Control Descriptions

Table 2.1 "Arizona Retirement Report (ASRS)" Controls

Control	Description
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is <blank>.
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Distribution Group	This is the group to which the report will be distributed. The report will be sent to myReports for each user in the group.
From Date	This control is required. Enter the first date for which report results should be returned.
To Date	This control is required. Enter the last date for which report results should be returned.
Employer Information	This section organizes controls that hold information about the employer.
Account Number	This control contains the employer's three-character account number, which is assigned by ASRS.
Department Number	This control contains the employer's six-character department number, which is assigned by ASRS.
Create Disk File	This control indicates whether a disk file will be created when the report is run. It is deselected by default.

Command Buttons

Table 2.2   "Arizona Retirement Report (ASRS)" Command Buttons

Button	Description
Print	Automatically sends the "Arizona Retirement Report (ASRS)" to myReports.
Reset	Performs a postback and sets the data in the controls to the state they were in when the page was last saved.
Save	If the report settings have not yet been saved, opens a popup page that allows user to save the current report settings and assign a name to the settings so they can be used at a later date. When **OK** is clicked, saves the settings and closes the popup page. Places cursor focus in the *Pay Group* control. When changes are made to a previously saved report, any changes are saved to the report settings and cursor focus is placed in the *Pay Group* control. Hidden if user does not have appropriate security permissions.
Save As	Opens a popup page that allows user to save the current report settings and assign a name to the settings so they can be used at a later date. When **OK** is clicked, saves the settings and closes the popup page. Places cursor focus in the *Pay Group* control. Hidden if user does not have appropriate security permissions.
Delete	Prompts user to delete the current report settings. When **OK** is clicked, deletes the saved report settings. Clears all controls and places cursor focus in the *Pay Group* control. Enabled only if the *Load Saved Report* option was used. Hidden if user does not have appropriate security permissions.

Report Output

Generated via the "Arizona Retirement Report (ASRS)" page, the report provides users with information about contributions to the employees' retirement plan. A sample report appears below.

New World City
ASRS Retirement Report
From Date: 01/01/2004 - To Date: 09/30/2005

SSN	Employee	Wages	Employee Contribution	Employer Contribution	Contract Number	Contribution Type
480-76-8368	Brach, Ann - 5	$941.05	$0.08	$0.00	23234434	Plan
340-44-7686	Brach, David - 143	$62,433.89	$14.62	$0.00	11111	Plan
352-62-9565	Brach, Janet - 142	$47,448.09	$15.38	$0.00	12341234	Plan
344-70-6187	Verbeeren, Brian a - 350	$9,636.00	$31.26	$93.76		
344-70-6187	Verbeeren, Brian a - 350	$9,636.00	$125.00	$41.66	3	Plan
344-70-6187	Verbeeren, Brian a - 350	$9,636.00	$1,400.00	$500.00	2	System
341-62-0396	Verbeeren, Curtis - 6	$86,741.80	$62.50	$62.50		Plan
341-62-0396	Verbeeren, Curtis - 6	$86,741.80	$83.34	$83.34		System
325-64-9147	Verbeeren, Douglas - 2	$40,233.71	$31.26	$93.76		Plan
325-64-9147	Verbeeren, Douglas - 2	$40,233.71	$41.66	$125.00		System
320-80-9019	Verbeeren, Eric Scott - 249	$42,201.51	$31.26	$93.76		
320-80-9019	Verbeeren, Eric Scott - 249	$42,201.51	$125.00	$41.66		Plan
339-74-7775	Verbeeren, James - 273	$5,713.75	$62.50	$20.83		Plan

Grand Totals:

Wages:	$51,837.51
Employee Contribution:	$62.52
Employer Contribution:	$187.52
Employee Plan Contribution:	$436.34
Employer Plan Contribution:	$260.41

Report Fields

Table 2.3   "Arizona Retirement Report (ASRS)" Fields

Column	Description
SSN	This column displays the employee's Social Security Number.
Employee	This column displays the employee's full name and number.
Wages	This column displays the earnings on which contributions were based.
Employee Contribution	This column displays the amount contributed to the plan by the employee.
Employer Contribution	This column displays the amount contributed to the plan by the employer.
Contract Number	This column displays the contract number on the employee's user-defined field, if one was specified.
Contribution Type	This column displays the type of contribution that was made.

PSPRS Report

The "PSPRS Report" accessed from the Human Resources menu (**Human Resources > State Requirements > AZ > PSPRS Report**), enables authorized users to select the information that appears on the Arizona Retirement Report and submit it to **myReports**. For a description of the procedures that can be performed on this page, please refer to Chapter 3, "Procedures."

Entry Control Descriptions

Table 2.4   "PSPRS Report" Controls

Control	Description
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is <blank>.
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Distribution Group	The group to which the report will be distributed. The report will be sent to myReports for each user in the group.
Pay Period Begin Date	This control is required. Enter the first pay batch end date for which the report should be run.
Pay Period End Date	This control is required. Enter the last pay batch end date for which the report should be run.
Create Disk File	This yes/no flag indicates whether a disk file will be created when the report is generated. It is deselected by default.

Benefit Groups Tab

As the default visible tab of the "PSPRS Report" page, the "Benefit Groups" tab enables users to specify the employees to include on the report by selecting their benefit groups.

Benefit Groups Tab Entry Control Descriptions

Table 2.5 "PSPRS Report" Benefit Groups Tab Controls

Control	Description
Available Benefit Groups	This control displays all benefit groups to which the user has authority. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups.
Selected Benefit Groups	This control displays all benefit groups that have been selected to include on the listing. At least one benefit group must be selected. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups.

Benefit Groups Tab Command Buttons

Table 2.6 "PSPRS Report" Benefit Groups Tab Command Buttons

Button	Description
Add	This button moves all selected benefit groups in the *Available Benefit Groups* multi-select textbox to the *Selected Benefit Groups* multi-select textbox. If no benefit groups are listed in the *Available Benefit Groups* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all benefit groups from the *Available Benefit Groups* multi-select textbox to the *Selected Benefit Groups* multi-select textbox. If no benefit groups are listed in the *Available Benefit Groups* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected benefit groups from the *Selected Benefit Groups* multi-select textbox to the *Available Benefit Groups* multi-select textbox. If no benefit groups are listed in the *Selected Benefit Groups* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all benefit groups from the *Selected Benefit Groups* multi-select textbox to the *Available Benefit Groups* multi-select textbox. If no benefit groups are listed in the *Selected Benefit Groups* multi-select textbox, the **Remove All** command button is disabled.

Deductions Tab

The "Deductions" tab enables users to specify the deductions to include on the report. The deduction amounts using these deduction codes will be reported as contributions. Only employees with one or more of these deduction codes in the reporting period will be included on the report.

Deductions Tab Entry Control Descriptions

Table 2.7   "PSPRS Report" Deductions Tab Controls

Control	Description
Available Deductions	This control displays all deductions to which the user has authority. Users may use Ctrl+Click to select multiple deductions or Shift+Click to select a range of deductions.
Selected Deductions	This control displays all deductions that have been selected to include on the listing. At least one deduction must be selected. Users may use Ctrl+Click to select multiple deductions or Shift+Click to select a range of deductions.

Deductions Tab Command Buttons

Table 2.8   "PSPRS Report" Deductions Tab Command Buttons

Button	Description
Add	This button moves all selected deductions in the *Available Deductions* multi-select textbox to the *Selected Deductions* multi-select textbox. If no deductions are listed in the *Available Deductions* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all deductions from the *Available Deductions* multi-select textbox to the *Selected Deductions* multi-select textbox. If no deductions are listed in the *Available Deductions* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected deductions from the *Selected Deductions* multi-select textbox to the *Available Deductions* multi-select textbox. If no deductions are listed in the *Selected Deductions* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all deductions from the *Selected Deductions* multi-select textbox to the *Available Deductions* multi-select textbox. If no deductions are listed in the *Selected Deductions* multi-select textbox, the **Remove All** command button is disabled.

Benefits Tab

The "Benefits" tab enables users to specify the benefit codes to include on the report.

Benefits Tab Entry Control Descriptions

Table 2.9 "PSPRS Report" Benefits Tab Controls

Control	Description
Available Benefit Codes	This control displays all benefit codes to which the user has authority. Users may use Ctrl+Click to select multiple benefit codes or Shift+Click to select a range of benefit codes.
Selected Benefit Codes	This control displays all benefit codes that have been selected to include on the listing. At least one benefit code must be selected. Users may use Ctrl+Click to select multiple benefit codes or Shift+Click to select a range of benefit codes.

Benefits Tab Command Buttons

Table 2.10 "PSPRS Report" Benefits Tab Command Buttons

Button	Description
Add	This button moves all selected benefit codes in the *Available Benefit Codes* multi-select textbox to the *Selected Benefit Codes* multi-select textbox. If no benefit codes are listed in the *Available Benefit Codes* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all benefit codes from the *Available Benefit Codes* multi-select textbox to the *Selected Benefit Codes* multi-select textbox. If no benefit codes are listed in the *Available Benefit Codes* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected benefit codes from the *Selected Benefit Codes* multi-select textbox to the *Available Benefit Codes* multi-select textbox. If no benefit codes are listed in the *Selected Benefit Codes* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all benefit codes from the *Selected Benefit Codes* multi-select textbox to the *Available Benefit Codes* multi-select textbox. If no benefit codes are listed in the *Selected Benefit Codes* multi-select textbox, the **Remove All** command button is disabled.

Hours Codes Tab

The "Hours Codes" tab enables users to specify the hours codes to include on the report.

Hours Codes Tab Control Descriptions

Table 2.11 "PSPRS Report" Hour Codes Tab Controls

Control	Description
Available Hour Code(s)	This control displays all hours codes to which the user has authority. Users may use Ctrl+Click to select multiple hour codes or Shift+Click to select a range of hour codes.
Selected Hour Code(s)	This control displays all hours codes that have been selected to include on the listing. At least one hours code must be selected. Users may use Ctrl+Click to select multiple hours codes or Shift+Click to select a range of hours codes.

Hours Codes Tab Command Buttons

Table 2.12 "PSPRS Report" Hour Codes Tab Command Buttons

Button	Description
Add	This button moves all selected hours codes in the *Available Hour Code(s)* multi-select textbox to the *Selected Hour Code(s)* multi-select textbox. If no hours codes are listed in the *Available Hour Code(s)* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all hours codes from the *Available Hour Code(s)* multi-select textbox to the *Selected Hour Code(s)* multi-select textbox. If no hours codes are listed in the *Available Hour Code(s)* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected hours codes from the *Selected Hour Code(s)* multi-select textbox to the *Available Hour Code(s)* multi-select textbox. If no hours codes are listed in the *Selected Hour Code(s)* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all hours codes from the *Selected Hour Code(s)* multi-select textbox to the *Available Hour Code(s)* multi-select textbox. If no hours codes are listed in the *Selected Hour Code(s)* multi-select textbox, the **Remove All** command button is disabled.

Command Buttons

Table 2.13 "PSPRS Report" Command Buttons

Button	Description
Submit	This button automatically sends the "PSPRS Report" to **myReports** and produces a transmittal file if *Create Disk File* selected.
Reset	This button updates the page and sets the data in the controls to the state they were in when the page was last saved.
Save	If the report settings have not yet been saved, this button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When **OK** is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the *Pay Period Begin Date* control. When changes are made to a previously saved report, any changes are saved to the report settings and the cursor focus is placed in the *Pay Period Begin Date* control. This button is hidden if the user does not have the appropriate security permissions.

Table 2.13 "PSPRS Report" Command Buttons (continued)

Button	Description
Save As	This button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When **OK** is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the *Pay Period Begin Date* control. This button is hidden if the user does not have the appropriate security permissions.
Delete	Enabled only if the *Load Saved Report* option was used, this button prompts the user to delete the current report settings. When **OK** is clicked, the saved report settings are deleted, all controls are cleared, and the cursor focus is placed in the *Pay Period Begin Date* control. This button is hidden if the user does not have the appropriate security permissions.

Report Output

Generated via the "PSPRS Report" page, the report provides users with information detailing retirement information for employees. Data on the report is sorted by *Name* and includes all employees whose batch pay end date is between the *Period Begin Date* and *Period End Date*, who are in the benefit group, and who have the selected deduction(s) specified. The report includes a count of all employees, and a total for the Contributions column. A sample report appears below.

Report Fields

Table 2.14 "PSPRS Report" Fields

Column	Description
Name	This column displays the full name of the employee.
SSN	This column displays the employee's Social Security Number.
Contributions	This column displays The total of the employee's contributions for the date range specified.

3

PROCEDURES

Overview

This chapter provides a step-by-step guide to reporting features. It details the following procedures:

- ◗ "Saving Report Settings"
- ◗ "Loading a Saved Report"
- ◗ "Printing a Report"

For information on specific reports and submitting reports, please see Chapter 1, "Reports."

Saving Report Settings

Use this procedure to save report settings for future use.

1 From the **Human Resources** > **State Requirements > AZ >** [Report Name] menu, select the report for which you want to save report settings. The report page displays.

2 Complete the controls for the report you selected as detailed in Chapter 2, "Reports."

3 Click the **Save** button to automatically save changes to an existing report template.

-OR-

Click the **Save As** button to save a new report template. A dialog similar to the following displays:

Please enter a new report criteria name	

OK Cancel

4 Enter a unique name for the report template in the *Please enter a new report criteria name* control.

5 Click **OK**.

The report settings are now saved for future use. For more information on loading a save report, please refer to the "Loading a Saved Report" topic.
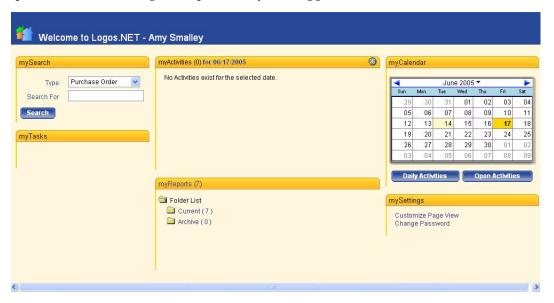
Loading a Saved Report

Use this procedure to load saved settings for the selected report.

1 From the **Human Resources** > **State Requirements** > **AZ** > [Report Name] menu, select the report for which you want to load a saved report**.** The report page displays.

2 Select the name of the previously saved report template, from the *Load Saved Report* control.

The controls update to display the saved report settings.

3 Make the necessary changes to the template or submit the report to **myReports**.

Printing a Report

The **myReports** feature on the "Printing a Report" displays folders that hold all reports that are waiting to be printed by the logged-in user.
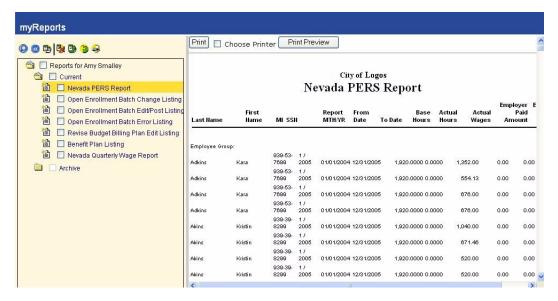

When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:

The report name is hyperlinked. Click on the name of the report you want to see, and the results will display on the right-hand side of the page:

To print the report, click the **Print** button.