Logos.NET
Public Administration Software

California State Requirements 2010

Training/User Guide

Updated 07/23/14

New World Systems
The Public Sector Software Company

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Overview

This manual provides instructions for the setup and use of the California PERS Report 2010:

California PERS Report 2010

The California PERS Report 2010 has been added to the California State Requirements menu. This report is submitted to the state of California each pay period.

California PERS Report Setup

The California PERS Report 2010 requires the setup of user-defined fields in *Employee Maintenance* or, for users of Workforce Administration, the **Employment** tab. These fields accommodate employee retirement contributions made through payroll deductions.

Employee User-Defined Fields

One section header and six user-defined text fields need to be set up for the California PERS Report 2010. The user-defined fields will be grouped under the section header on the Employee User-Defined page in *Employee Maintenance* or the **Employment** tab of Workforce Administration.

Section Header

CalPERS 2010

Text Fields

- *CA Participant ID*
- *CA Pay Rate Type*
- *CA Scheduled Full Time Days/Week*
- *CA Scheduled Full Time Hour/Week*
- *CA Appointment ID*
- *CA Division ID*

Employee Section Header Setup

To set up the section header that will group the user-defined employee text fields, follow these steps:

1. Navigate to **Maintenance > Logos Suite > Security > User-Defined Fields**. The User-Defined Field List page will open.
2. Select ***Employee*** from the *Record Type* dropdown or, if you use Workforce Administration, ***Employee Employment***.
3. Select ***Section Headers*** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined employee section headers.

4 Click **New**. The User-Defined Fields Section Header popup will open.

5 For *Section Header*, type ***CalPERS 2010***.

6 Use the *Sequence Number* field to tell where you want the **CalPERS 2010** section to appear in relation to other sections on the Employee User-Defined page in *Employee Maintenance* or, if you use Workforce Administration, the **Employment** tab; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the **CalPERS 2010** section to appear below those sections, select ***4*** from the dropdown. If you want the section to appear somewhere in between, change the sequence numbers of the other sections accordingly. If you want the section always to appear at the top of the page, select ***1***; if you want it always to appear at the bottom of the page, select ***99***.

7 Click **OK**. The popup will close, and the grid on User-Defined Field List page will refresh to show the newly added **CalPERS 2010** section header.

Employee Text Fields Setup

To set up the user-defined text fields that will be part of the **CalPERS 2010** section, follow these steps:

1 Navigate to **Maintenance > Logos Suite** > **Security** > **User-Defined Fields**. The User-Defined Field List page will open.

2 Select ***Employee*** from the *Record Type* dropdown. If you use Workforce Administration, select ***Employee Employment***.

3 Select ***Attributes*** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined employee fields.

4 Click **New**. The User-Defined Fields popup will open.

5 Complete the fields ***exactly*** as follows:

Field	Value
Name	CA Participant ID
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text
Maximum Length	10
Required	(leave unchecked)

NOTE:

Created by the new system during enrollment, the ***CA Participant ID*** *is a unique, 10-digit identifier that will replace a member's social security number.*

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

Repeat steps four through six for the five remaining text fields that need to be set up. The following five tables contain the entries you will need to make:

Field	Value
Name	CA Pay Rate Type
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text
Maximum Length	3
Required	(leave unchecked)

NOTE:

The ***CA Pay Rate Type*** *identifies the hourly or monthly pay rate and determines how the pay rate will be created. The entry in this field must be* ***HRY*** *(hourly) or* ***MTY*** *(monthly). If it is* ***HRY****, the hourly rate of pay will be used; if it is* ***MTY****, a member's pay will be annualized and divided by 12. This entry is required when the Record Type is Payroll and the Transaction Type is not* ***Retroactive Special Compensation Adjustment****.*

Field	Value
Name	CA Scheduled Full Time Days/Week
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text

Field	**Value**
Maximum Length	7
Required	(leave unchecked)

NOTE:

*The **CA Scheduled Full Time Days/Week** entry is the number of days per week considered full time for a position. This entry is required when the Record Type is Payroll and the Pay Rate Type is Daily. It is not required for judges, legislators or optional members or when Transaction Type is Retroactive Special Compensation Adjustment.*

Field	**Value**
Name	CA Scheduled Full Time Hour/Week
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text
Maximum Length	7
Required	(leave unchecked)

NOTE:

*The **CA Scheduled Full Time Hour/Week** entry is the number of hours per week considered full time for a position. This entry is required when the Record Type is Payroll. It is not required for judges, legislators or optional members or when Transaction Type is Retroactive Special Compensation Adjustment.*

Field	**Value**
Name	CA Appointment ID
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text

Field	Value
Maximum Length	10
Required	(leave unchecked)

NOTE:

*The **CA Appointment ID** uniquely identifies the employee's job. CalPERS will generate and store appointment IDs for employees at the time of enrollment. This entry is required if multiple appointments exist with the reporting employer. Prior to system implementation, CalPERS will provide employers with a list of appointment IDs for their employees. After system implementation, employers may run a report online to generate a list of appointment IDs.*

Field	Value
Name	CA Division ID
Section Header	CalPERS 2010
Sequence Number	(your choice)
Data Type	Text
Maximum Length	10
Required	(leave unchecked)

When you are finished, the *Employee 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 **CalPERS 2010** section.

Employee Setup for California PERS Reporting

To set up an employee for California PERS reporting, follow these steps:

1. Navigate to **Human Resources** > **Employee Maintenance**. The Employee List page will open. If you use Workforce Administration, navigate to **Human Resources** > **Workforce Administration** > **Search**. The Employee Search page will open.

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 retirement system reporting. The Employee page will open.

4. If you use Employee Maintenance, select ***User-Defined*** from the *Attribute* dropdown. The page will refresh to show existing user-defined fields, including an **CalPERS 2010** section containing the three text fields you set up earlier. If you use Workforce Administration, select the **Employment** tab.

5. Under the **CalPERS 2010** section header, make the appropriate entries in the *CA Participant ID*, *CA Pay Rate Type*, *CA Scheduled Full Time Days/Week*, *CA Schedule Full Time Hour/Week*, *CA Appointment ID* and *CA Division ID* fields.

6. After making your entries, click **Save** to save them.

7. Repeat these steps for each employee who will be included in the report.

Report Setup

The following steps show you how to perform additional setup needed to create your state retirement data. The setup includes adding validation-set codes for special compensation categories and types; selecting the employer's CalPERS ID, program type and the benefit groups to be reported; associating contribution codes with benefit and deduction codes; selecting the hours codes to be included in wage reporting; and associating special compensation codes with hours and benefit codes:

1. To set up the special compensation categories and types to be associated with hours codes, navigate to **Maintenance** > **Logos Suite** > **System** > **Validation Sets** > **Validation Set List**.

2. Select (highlight) validation set *469* (*CalPERS Special Comp Category*).

3. Click the **Values** button. The Validation Set Values List page will open.

4. Add the following special compensation category values and descriptions:

Value	Description
EDP	*Educational Pay*
ICP	*Incentive Pay*
PPP	*Premium Pay*
SAP	*Special Assignment Pay*
SSI	*Statutory Items*

5 Breadcrumb back to the Validation Set List page.

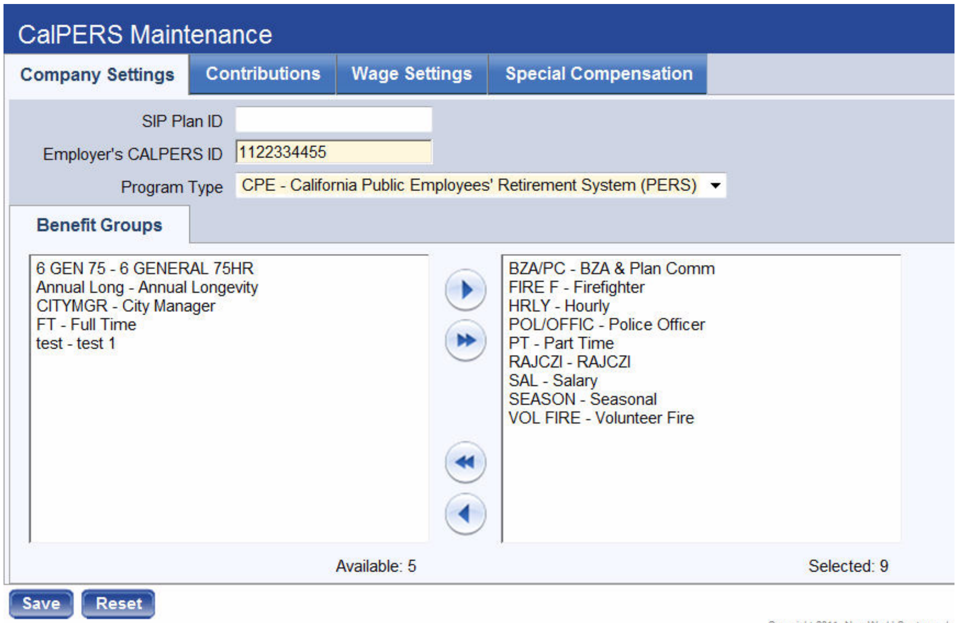
6 Select (highlight) validation set *470* (*CalPERS Special Comp Type*).

7 Click the **Values** button. The Validation Set Values List page will open.

8 Same as you did in step 4, add the special compensation type values and descriptions that may be found in the CalPERS state manual. The table below contains a sampling of this data:

Value	Description
AAD	*Applicator's Differential*
CPA	*Certified Public Accountant Incentive*
EEI	*Educational Incentive*
EMT	*Emergency Medical Tech Pay*
NPP	*Notary Pay*

9 Navigate to **Human Resources > State Requirements > CA > CALPERS Maintenance**. The CalPERS Maintenance page will open, with the **Company Settings** tab brought forward, as shown below:



10 If applicable, type the Supplemental Income Plan identifier in the *SIP Plan ID* field.

11 Type the *Employer's CALPERS ID*, a 10-digit, state-assigned employer identifier.

12 In the *Program Type* field, select the retirement program for the transaction record sent by the employer. Click in the field to select from a list of valid program types.

13 In the *Available* **Benefit Groups** list box, select the benefit groups to be included in the reporting, and move them to the *Selected* box.

14 After completing your selections on this tab, click **Save**.

15 Click the **Contributions** tab to bring it forward:

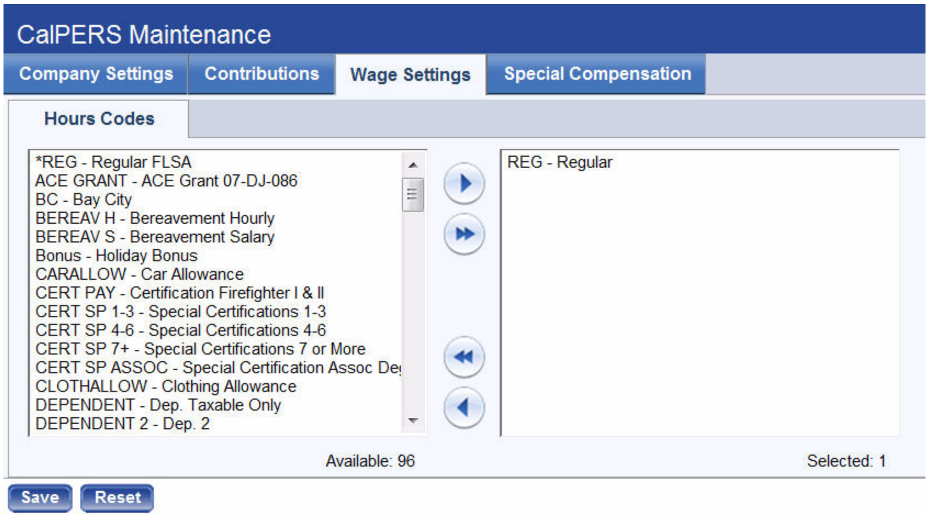
This tab contains two tabs, **Deduction Codes** and **Benefit Codes**. The grid on the **Deduction Codes** tab contains all deduction codes and associated contribution codes. The grid on the **Benefit Codes** tab contains all benefit codes and associated contribution codes.

16 To associate a deduction or benefit code with a contribution code, click once in the *Contribution* cell adjacent to the *Deduction* or *Benefit* to enable it, click again to display a dropdown list of the available contribution codes, and click the code you want. It will populate the *Contribution* cell automatically.

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

17 Click **Save**.

18 Click the **Wage Settings** tab to bring it forward:

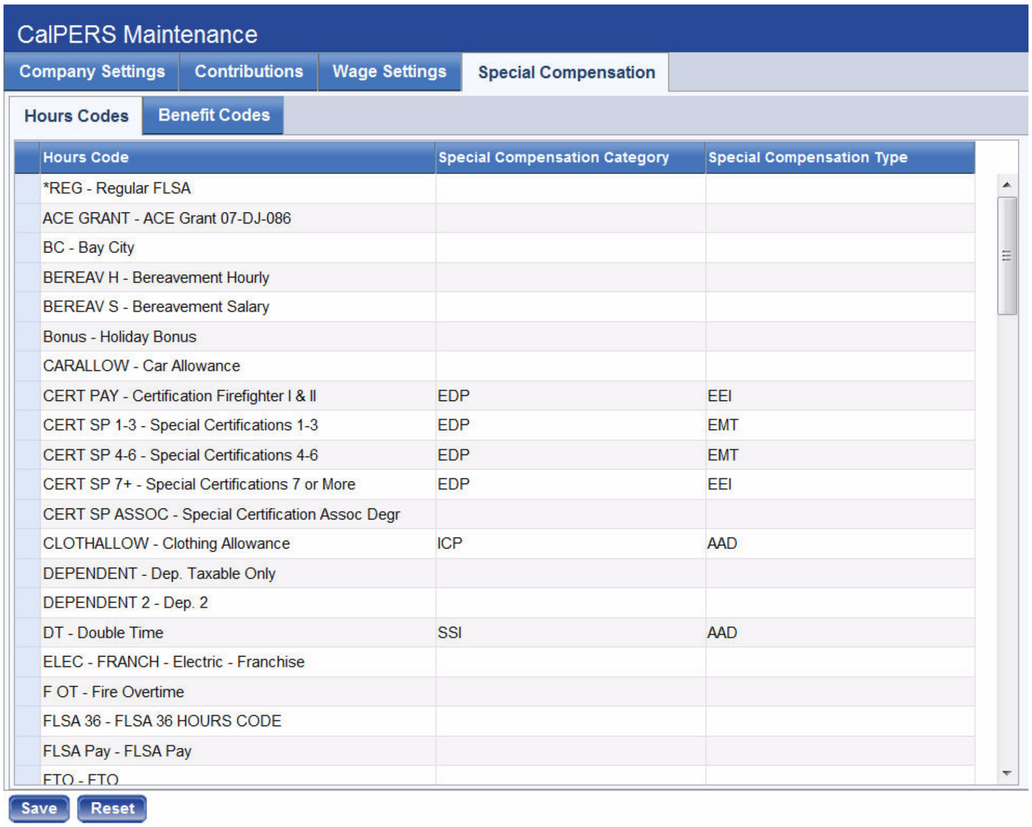


This tab contains multi-select list boxes for the selection of hours codes to be included in the wage reporting.

19 From the list of codes in the *Available* (left) box, select those that will be included, and click the right-arrow button to move the codes to the *Selected* (right) box. Only active codes are available for selection.

20 Click **Save**.

21 Click the **Special Compensation** tab to bring it forward:



Hours Code	Special Compensation Category	Special Compensation Type
*REG - Regular FLSA		
ACE GRANT - ACE Grant 07-DJ-086		
BC - Bay City		
BEREAV H - Bereavement Hourly		
BEREAV S - Bereavement Salary		
Bonus - Holiday Bonus		
CARALLOW - Car Allowance		
CERT PAY - Certification Firefighter I & II	EDP	EEI
CERT SP 1-3 - Special Certifications 1-3	EDP	EMT
CERT SP 4-6 - Special Certifications 4-6	EDP	EMT
CERT SP 7+ - Special Certifications 7 or More	EDP	EEI
CERT SP ASSOC - Special Certification Assoc Degr		
CLOTHALLOW - Clothing Allowance	ICP	AAD
DEPENDENT - Dep. Taxable Only		
DEPENDENT 2 - Dep. 2		
DT - Double Time	SSI	AAD
ELEC - FRANCH - Electric - Franchise		
F OT - Fire Overtime		
FLSA 36 - FLSA 36 HOURS CODE		
FLSA Pay - FLSA Pay		
FTO - FTO		

This tab provides a way to mark specific hours codes and benefit codes with special compensation categories and types. All hours codes and benefit codes, regardless of effective dates and statuses, are listed on separate tabs.

22 To associate an hours code or benefit code with a special compensation category and type, click once in the special compensation cell adjacent to the hours code or benefit code to enable it, click again to display a drop-down list of the available compensation codes, and click the code you want.

The available selections for *Special Compensation Category* and *Special Compensation Type* come from validation sets 469, *CalPERS Special Comp Category*; and 470, *CalPERS Special Comp Type*. Each selection is a three-character code.

When CalPERS data is created, the dollar amounts associated with the special compensation hours codes and benefit codes will populate the CalPERS Record Detail pages.

23 Click **Save**.

Create California Retirement Data

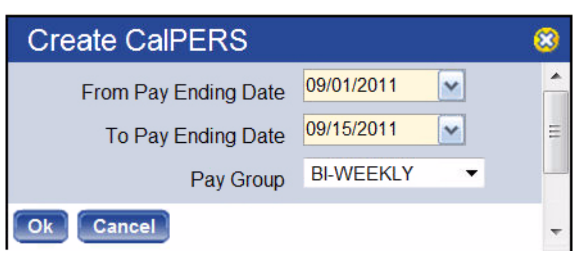
Once you have completed the setup, you will be ready to create an on-screen work file of the retirement data that will be available for the California PERS Report 2010. This data may be reviewed and modified before it is transmitted to the state.

To create the work file, follow these steps:

1 Navigate to **Human Resources** > **State Requirements** > **CA** > **CalPERS 2010 List**. The California CalPERS 2010 List page will open:

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.

2 Click the **Create** button. The Create CalPERS popup will open:



3 In the *From Pay Ending Date* and *To Pay Ending Date* fields, respectively, select the first and last payroll dates that will be included in the report data.

The *Period Begin Date* on each employee's CalPERS Member Entry page will be the first day of the earliest pay batch found within the *From Pay Ending Date* and *To Pay Ending Date* range selected, and the *Period End Date* will be the last day of the latest pay batch found

4 Use *Pay Group* field to select the pay group for which CalPERS data will be created. Click in the field to select from a drop-down list of available pay groups.

5 After making your selections, click **OK**. If a work file has been created previously, a message will display, telling you the previously created work file will be cleared and asking whether you want to continue. If you do, click *Accept*.

The current retirement data--including annual compensation, employer and employee contributions, the hours worked for the pay batches run within the selected period, payroll wages and the dollar amounts associated with special compensation hours codes and benefit codes--will populate the work file, and the grid on the California CalPERS 2010 List page will refresh to show all employees who have been paid using the hours codes you set up in Maintenance.

NOTE:

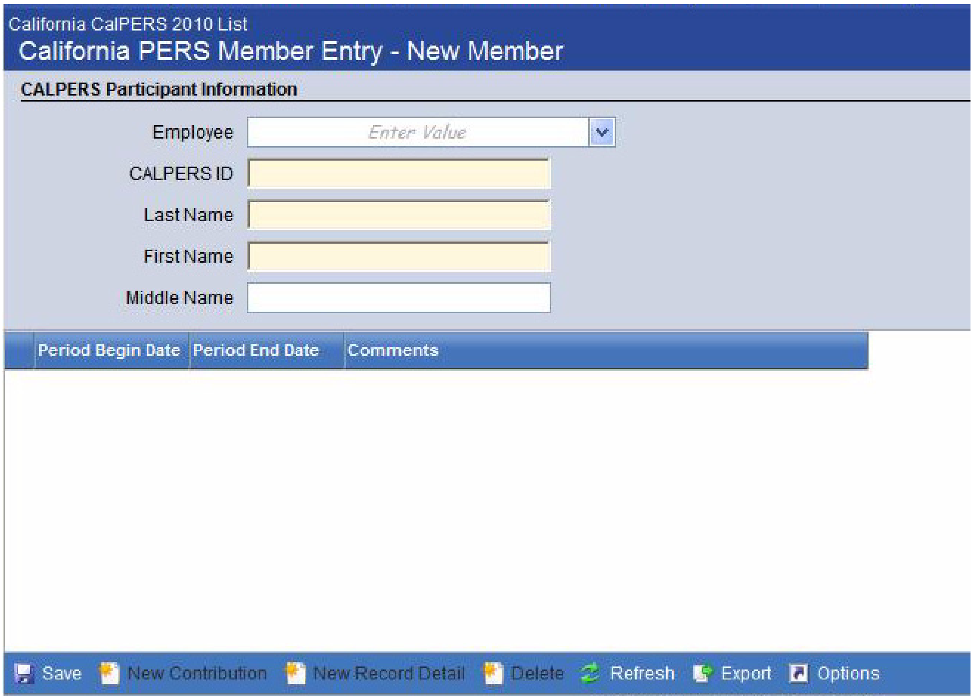
The CalPERS benefit no longer will calculate a negative.

Add or Edit CalPERS Retirement Data

To edit or add CalPERS retirement contribution data, follow these steps:

1 If you need to edit data for a particular employee, click the hyperlinked *Employee Number*. The California PERS Member Entry page will open. If you need to add an employee to the grid on the California CalPERS 2010 List page, click the **New** button located in the bottom border of the grid. The California PERS Member Entry-New Member page will open.

Both pages contain the same fields, except the latter also contains an *Employee* field for selecting the employee to be added to the list. The image below is an example of the California PERS Member Entry-New Member page:



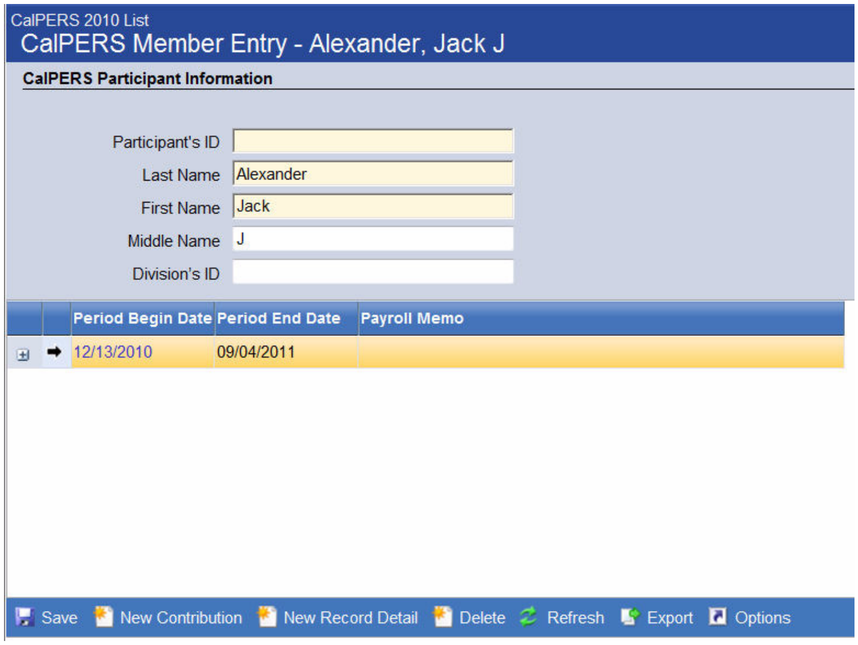
2 To select the employee, begin typing the employee's name or ID in the *Employee* field, and when the name appears in the dropdown, click it. You also may click the field prompt to select the name from a complete list of employee names sorted by ID in ascending order.

Selecting a name automatically populates the applicable *Name* fields.

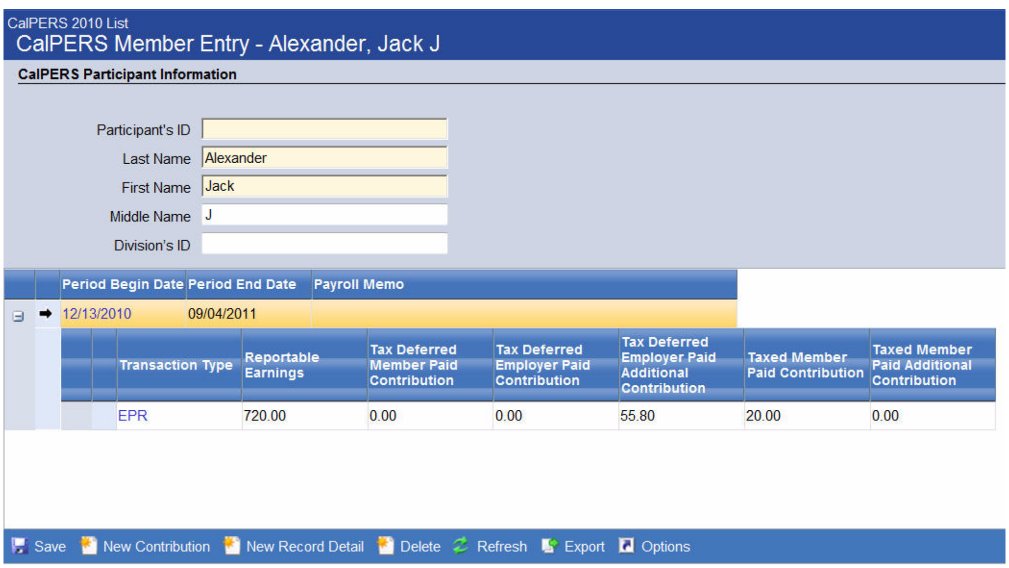
3 Fill in the *CALPERS ID*, the unique, 10-digit identifier created by the new system. This identifier replaces the *Employer/Unit Code*.

4 After completing your entries, click **Save**.

Below is an example of the California PERS Member Entry page in edit mode, where the grid under the CalPERS member's name and ID contains the member's contribution records. Each row corresponds to a record:



Click the plus sign + to the left of a row to show a second level summarizing the contribution record. Below is an example:



Editing or Adding a Contribution Record

To edit a contribution record, click the hyperlinked *Period Begin Date*. To add a retirement contribution record for a CalPERS member, click the **New Contribution** button located in the bottom border of the grid. In either case, the CalPERS Contribution Record popup will open:

1 In the *Record Period Begin Date* field, type the earned period start date for the record being reported, or click the field prompt button to select the date from a popup calendar.

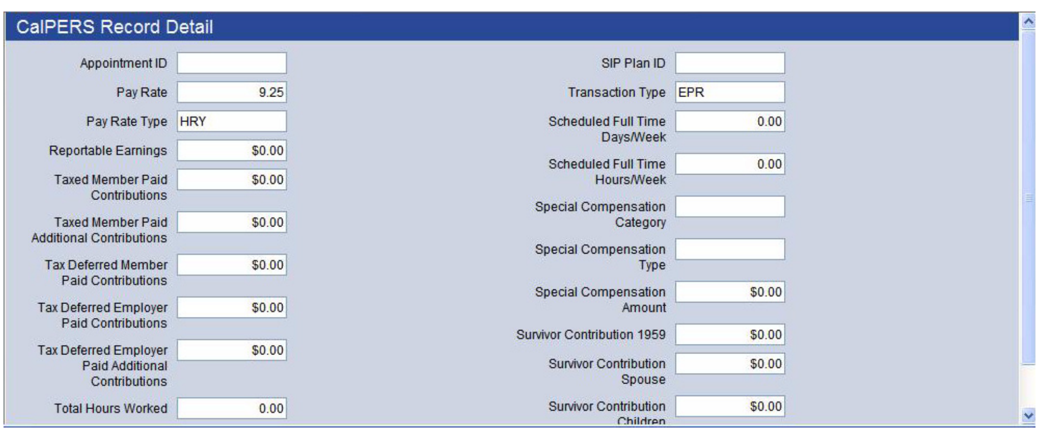
2 In the *Record Period End Date* field, type the earned period end date for the record being reported, or click the field prompt button to select the date from a popup calendar.

3 If necessary, use the *Payroll Memo* field to type a note related to the reason for this contribution record; for example, if you are correcting a previous entry, type, ***Correcting entry***.

4 Click **OK** to save your entries and update the grid.

Editing or Adding Contribution Record Detail

To edit the details of a contribution record, click the hyperlinked *Transaction Type*. To fill in the details of a new retirement contribution record for a CalPERS member, click the **New Record Detail** button located in the bottom border of the grid. In either case, the CalPERS Record Detail page will open:



1 Make entries in the appropriate fields. The following table contains descriptions of the fields on this page:

Field	Description
Appointment ID	Required if multiple appointments exist with the reporting employe, uniquely identifies the job into which the employee has been hired. CalPERS will generate and store appointment IDs for employees at the time of enrollment.
Pay Rate	Required if the record type is ***Payroll*** and the *Transaction Type* is not ***Retroactive Special Compensation Adjustment***, dollar amount for a given *Pay Rate Type*.
Pay Rate Type	Required if the record type is ***Payroll*** and the *Transaction Type* is not ***Retroactive Special Compensation Adjustment***, identifies hourly, daily or monthly pay rate.
Reportable Earnings	Required if the record type is ***Payroll***, or if the record type is ***Supplemental Income Plan Deduction*** and the SIP is ***Peace Officers and Fire Fighters***, earnings reported for members during the reported period as defined by CalPERS (does not include special compensation). This information should not be reported if the *Transaction Type* is ***Retroactive Special Compensation Adjustment***.
Tax Member Paid Contributions	After-tax contribution/deduction amount paid by the member.
Tax Member Paid Additional Contributions	After-tax additional contribution amount paid by the member.
Tax Deferred Member Paid Contributions	Pre-tax contribution/deduction amount paid by the member.
Tax Deferred Employer Paid Contributions	Pre-tax contribution amount paid by employer.
Tax Deferred Employer Paid Additional Contributions	Pre-tax additional contribution amount paid by employer.

Field	Description
Total Hours Worked	Required if the record type is ***Payroll*** and the member is a CalPERS retiree, total number of hours a CalPERS retiree has worked during a reporting period.
SIP Plan ID	Required if the record type is ***Supplemental Income Plan Deduction***, unique identifier created by the new system. CalPERS will supply this identifier to the employer at the time of the Supplemental Income Plan contract finalization. This unique identifier is reported for each contribution record submitted.
Transaction Type	Required if the record type is ***Payroll***, describes transaction being reported (***Earned Period***, ***Prior Period Adjustment***, ***Retroactive Salary Adjustment***).
Scheduled Full Time Days/ Week	Required if the record type is ***Payroll*** and the *Pay Rate Type* is ***Daily***, number of days per week considered full time for a position. This entry is not required for judges, legislators, optional members or when the *Transaction Type* is ***Retroactive Special Compensation Adjustment***.
Scheduled Full Time Hours/ Week	Required if the record type is ***Payroll***, number of hours per week considered full time for a position. This entry is not required for judges, legislators, optional members or when the *Transaction Type* is ***Retroactive Special Compensation Adjustment***.
Special Compensation Category	Identifies the special compensation category being reported. A payroll record may contain multiple special compensation categories.
Special Compensation Type	Identifies the special compensation type being reported. A payroll record may contain multiple special compensation types, but they must comply with the California Code of Regulations 571 (a) and (b).
Special Compensation Amount	Required if reporting special compensation for the member, dollar amount of special compensation. The payroll record may contain multiple special compensation amounts, but the *Special Compensation Category* should be listed once only per record. There may be multiple special compensation types.

Field	Description
Survivor Contribution 1959	Required if the record type is ***Payroll*** and the member is enrolled in the CalPERS 1959 Survivor Benefit Program, the 1959 survivor benefit contribution amount paid by the member.
Survivor Contribution Spouse	Required if the record type is ***Payroll*** and the member is enrolled in the Judges Survivor Benefit Program (spouse), surviving spouse contribution amount paid by member.
Survivor Contribution Children	Required if the record type is ***Payroll*** and the member is enrolled in the Judges Survivor Benefit Program (children), surviving children contribution amount paid by member.
After-Tax Loan Payment	Taxed member paid loan payment contributions for the period reported. This entry is applicable only for program types of SIP-457 Plan and SIP-401(k) Plan and for employers with a loan provision on their SIP agreements.

2 After completing your entries on this page, click **OK** to save them.

Generate California CalPERS Report

To generate and display the California CalPERS Report containing the latest retirement data, click the **Print** button located in the bottom border of the grid on the California CalPERS 2010 List page. A PDF and transmittal file of the report also will be submitted to *myReports*.

Sample California CalPERS Report

|1|of 1|100%|Find \| Next|Select a format|Export|

City of NWS - 6.1SP5 Rel

CalPERS Report

Program Type: CPE Report Type: REG RecordType: PAY

Date Range: 1/1/2011 - 9/25/2011 Employer CalPERSID: 1122334455

						Taxed Contributions		Tax Deferred Contributions			
Pay Rate	**Pay Rate Type**	**Transaction Type**	**Reportable Earnings**	**Full Time Days/Week**	**Full Time Hours/Week**	**Member Paid**	**Member Paid Addl.**	**Member Paid**	**Employer Paid**	**Employer Paid Addl.**	**Total Hours Worked**
Employee: 162 · Calpers , Annual											
Period Begin Date: 12/27/2010		**Period End Date:** 9/14/2011			**Appointment ID:**			**SIP Plan ID:**			
$2,500.00	HRY	EPR	$1,449.27	0.00	0.00	$0.00	$0.00	$75.57	$28.99	$0.00	0.00
Employee: 161 · Calpers , Hourly No Grade											
Period Begin Date: 12/27/2010		**Period End Date:** 9/14/2011			**Appointment ID:**			**SIP Plan ID:**			
$5,200.00	HRY	EPR	$2,400.00	0.00	0.00	$0.00	$0.00	$125.15	$48.00	$0.00	0.00
Employee: 159 · Calpers , Hourly Rate - Grade											
Period Begin Date: 12/27/2010		**Period End Date:** 9/14/2011			**Appointment ID:**			**SIP Plan ID:**			
$2,643.33	HRY	EPR	$1,220.00	0.00	0.00	$0.00	$0.00	$63.62	$24.40	$0.00	0.00
Employee: 160 · Calpers , Salary											
Period Begin Date: 12/27/2010		**Period End Date:** 9/14/2011			**Appointment ID:**			**SIP Plan ID:**			
$10,833.33	MTY	EPR	$0.00	0.00	0.00	$0.00	$0.00	$250.66	$100.00	$0.00	0.00
Employee: 158 · Rajczi, Mary											
Period Begin Date: 12/27/2010		**Period End Date:** 9/14/2011			**Appointment ID:**			**SIP Plan ID:**			
$0.00	HRY	EPR	$0.00	0.00	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00
Survivor Contribution 1959:		$0.00	Survivor Contribution Spouse:		$0.00	Survivor Contribution Children:		$0.00	After Tax Loan Payment:		
Special Compensation Category:	Statutory Items				Special Compensation Type:	Applicator's Differential		Special Compensation Amount:			$500.00
$0.00	HRY	EPR	$0.00	0.00	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00
Survivor Contribution 1959:		$0.00	Survivor Contribution Spouse:		$0.00	Survivor Contribution Children:		$0.00	After Tax Loan Payment:		
Special Compensation Category:	Educational Pay				Special Compensation Type:	Emergency Medical Tech Pay		Special Compensation Amount:			$350.00
Totals:			**$8,269.27**			**$0.00**	**$0.00**	**$915.00**	**$201.39**	**$335.01**	
Survivor Contribution 1959:		**$0.00**	Survivor Contribution Spouse:		**$0.00**	Survivor Contribution Children:		**$0.00**	After Tax Loan Payment:		**$0.00**

Special Comp Category	**Special Comp Type**	**$0.00**
Special Comp Category Educational Pay	**Special Comp Type Educational Incentive**	**$450.00**
Special Comp Category Educational Pay	**Special Comp Type Emergency Medical Tech Pay**	**$350.00**
Special Comp Category Statutory Items	**Special Comp Type Applicator's Differential**	**$500.00**

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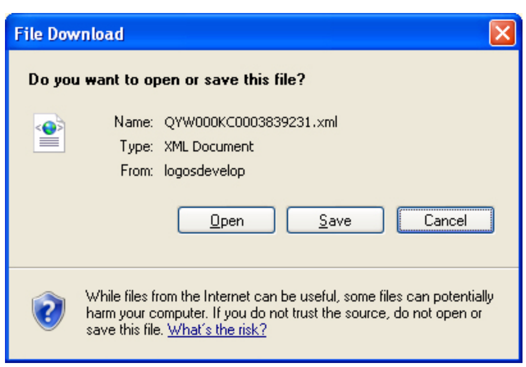
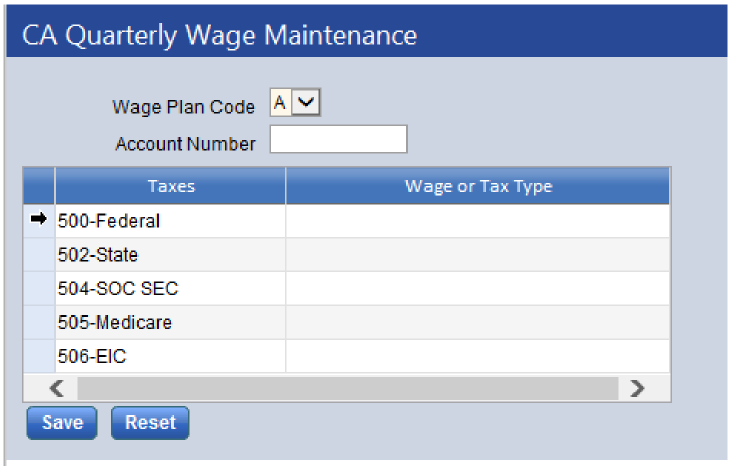
To view the transmittal file, click the *California PERS Transmittal File* in *myReports*. As shown below, a File Download popup will open:



Click **Open** to view the file. To save the file to a location on your PC, click **Save**.

California Quarterly Wage Maintenance

Use the California Quarterly Wage Maintenance page to set up multiple wage plan codes and associate multiple tax codes with each wage plan code:



Wage Plan Code identifies the wage plan setup.The following codes are available for selection from the drop-down: ***A***, ***J***, ***L***, ***P***, ***R***, ***S*** and ***U***.

Account Number accepts up to eight (8) characters.

In the grid, the *Taxes* column contains all taxes that have been set up, regardless of status or date. To associate a tax with a wage or tax type, click in the *Wage or Tax Type* cell corresponding with the tax, and select one of the following from the drop-down:

- ***State Disability Insurance***
- ***Personal Income Tax Wage***
- ***Personal Income Tax Withheld***
- ***Personal Income Tax Wage and Withheld***

You may have multiple taxes set up for the same wage or tax type.

California Quarterly Wage Report

Use California Quarterly Wage Report page to generate a report and transmittal file of wage information to be sent to the state of California each quarter.

Print permissions for the security component, *CA-Quarterly Wage Report*, are required to view the page and print the report. When print permissions are removed, the *Create Transmittal File* check box is disabled.

The following table contains descriptions of the fields on this page:

Field	Description
Load Saved Report	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 *Load Saved Report* 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.
Override Report Title	Overrides the default report title (California Quarterly Wage Report).
Distribution Group	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. (For more information about this field, refer to the "Common Controls" appendix of your *Human Resources User Guide*.)
Email Group	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 .
Quarter	Required. Identifies the fiscal quarter being reported. The available selections are ***1*** (Jan.-Mar.), ***2*** (Apr.-June), ***3*** (July-Sept.) and ***4*** (Oct.-Dec.).
Year	Required. Identifies the year of the fiscal quarter being reported. Type all four digits of the year. The current year is the default.

Field	Description
Employer Name	Required. Official name registered with the state retirement system.
Create Transmittal File	Determines whether a transmittal file of the same information will be generated with the report and sent to *myReports*. Check this box to generate the file.
Multiple Accounts	
Wage Plan Code	Required. Identifies the wage plan code for which the report will be run. Wage plan codes are set up on the CA Quarterly Wage Maintenance page. This field is enabled only when *Multiple Accounts* is deselected. If *Multiple Accounts* is selected, the wage plan code is always ***A***.

After making your entries, click **Submit** to generate and display the report. If you selected *Create Transmittal File*, a transmittal file of the report data will be sent to myReports.

Click the **Reset** button to update the page and set the selections to what they were when the report last was run.

On the report itself, the quarter and year reported display directly below the report title. The report body is sorted alphabetically by *Employee* and contains the following columns of information:

- *Employee*
- *SSN* (Social Security Number)
- *Unemployment and State Disability Wages*
- *Personal Income Tax Wages*
- *Personal Income Withheld*