

# **Iowa State Requirements**

Training/User Guide

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# **Overview**

This manual provides instructions for the setup and use of the Iowa PERS Periodic Wage Detail Report:

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# **Iowa State Requirements**

# **Iowa PERS Report Setup**

The lowa PERS Report requires the setup of user-defined fields in *Employee Maintenance* and *Deductions and Benefits Maintenance*. These fields accommodate employee retirement contributions made through payroll deductions.



Customers who are using Workforce Administration will see these fields in the **User-Defined Fields** section of the **Employment** tab.

# **Employee User-Defined Fields**

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

Section Header

#### **IPERS Report**

Text Field

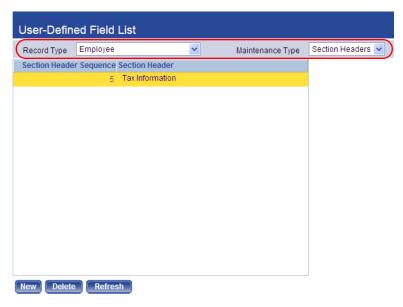
- IA PERS Occupation Class
- IA PERS Termination Indicator

# **Employee Section Header Setup**

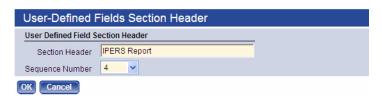
To set up the section header that will group the user-defined employee text fields on the Employee User-Defined page in *Employee Maintenance* (or the **Employment** tab in *Workforce Administration*), follow these steps:

- 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 are using *Workforce Administration*, select *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:

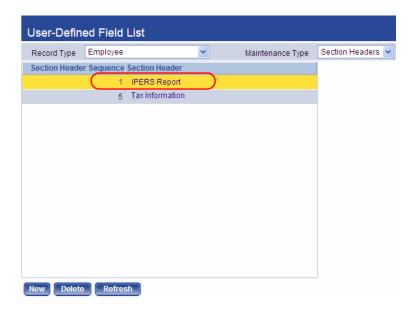




4 Click **New**. The User-Defined Fields Section Header popup will open:



- For Section Header, type IPERS Report. The user-defined text fields that you will create for the lowa PERS Report will be grouped under this header on the Employee User-Defined page in Employee Maintenance (or the Employment tab in Workforce Administration).
- Use the Sequence Number field to tell where you want the IPERS Report section to appear in relation to other sections on the Employee User-Defined page in Employee Maintenance (or the Employment tab in Workforce Administration); for example, if the Employee User-Defined page already contains three sections (sequence numbers 1 through 3), and you want the IPERS Report section to appear below those sections, select 4 from the dropdown. If you want the section to appear somewhere in between, you will need to 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 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 **IPERS Report** section header:



# **Employee Text Fields Setup**

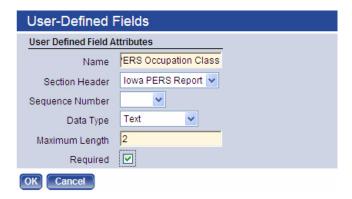
To set up the user-defined text fields that will be part of the **IPERS Report** section on the Employee User-Defined page in *Employee Maintenance* (or the **Employment** tab in *Workforce Administration*), follow these steps:

- 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 are using *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:

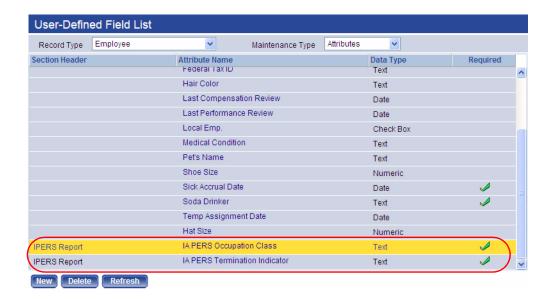
Field	Value
Name	IA PERS Occupation Class
Section Header	IPERS Report
Sequence Number	(Your choice.)
Data Type	Text
Maximum Length	2
Required	(Check this box.)

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

Repeat steps four through six for the other text field that needs to be set up. The following table contains the entries you will need to make:

Field	Value
Name	IA PERS Termination Indicator
Section Header	IPERS Report
Sequence Number	(Your choice.)
Data Type	Text
Maximum Length	1
Required	(Check this box.)

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 **IPERS Report** section:



#### **Deduction Code User-Defined Field**

One section header and one user-defined deduction code need to be set up for the IPERS Periodic Wage Detail report. The user-defined deduction code will appear under the section header on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*:

Section Header

**IPERS Report** 

Check Box

**IA PERS Deduction** 

# **Deduction Code Section Header Setup**

To set up the section header that will group the user-defined deduction code check box on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow these steps:

- Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
- **2** Select **Deduction** 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 deduction code section headers.
- 4 Click **New**. The User-Defined Fields Section Header popup will open.
- **5** For Section Header, type **IPERS Report**. (The user-defined check box that you will create for the lowa PERS Report will appear under this header on the Deduction Code User-Defined Fields page in Deductions and Benefits Maintenance.)



- 6 Use the Sequence Number field to tell where you want the IPERS Report section to appear in relation to other sections on the Deduction Code User-Defined Fields page in Deductions and Benefits Maintenance; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the IPERS Report section to appear below those sections, select 4 from the dropdown. If you want the section to appear somewhere in between, you will need to 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 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 **IPERS Report** section header.

### **Deduction Code Check Box Setup**

To set up the user-defined check box that will be part of the **IPERS Report** section on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow these steps:

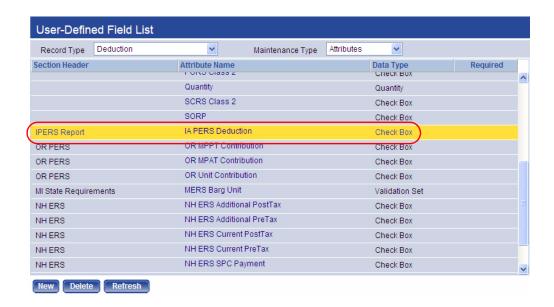
- 1 Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
- **2** Select **Deduction** from the **Record Type** dropdown.
- 3 Select **Attributes** from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined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

Field	Value
Name	IA PERS Deduction
Section Header	IPERS Report
Sequence Number	1
Data Type	Check Box
Maximum Length	(Selecting a Data Type of Check Box will hide this field.)
Required	(Selecting a Data Type of Check Box will hide this field.)

6 Click OK.

The Deduction Attributes grid on the User-Defined Field List page should contain a row for the check box you have saved as part of the IPERS Report section on the Deduction Code User-Defined Fields page in Deductions and Benefits Maintenance:

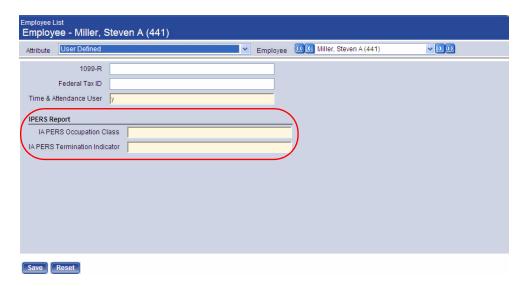




# Employee Setup for Iowa PERS Reporting

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

- Navigate to Human Resources > Employee Maintenance. (If you use Workforce Administration, Human Resources > Workforce Administration > Search.) The Employee List/ 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 From the Attribute dropdown, select **User Defined**. (In Workforce Administration, click the **Employment** tab to bring it forward.) The page will refresh to show existing user-defined fields, including an **IPERS Report** section containing the two text fields you set up earlier:





5 Under the **IPERS Report** section header, make the appropriate entries. The following table contains the valid entries for *IA PERS Occupation Class*:

Occupation Code	Description
01	Regular
02	Conservation Peace Officers
03	Sheriffs/Deputy Sheriffs
04	Legislators
05	Correctional Officers
06	City Police Officers
07	Airport Firefighters
08	Airport Safety Officers
10	DOT Peace Officers
11	Education Related
13	Firefighters
15	Fire Prevention Inspector Peace Officers
16	Airport Security Officers
17	Part-Time Elected Officials (excluding county sheriffs)
18	County Conservation Peace Officers
19	Licensed Health Care Professionals
20	Emergency Medical Service Providers

An entry of Y (Yes) is required in the *IA PERS Termination Indicator* field if a member has terminated employment during the reporting period. An N (No) is assumed for all others.

Any employee who has an entry in the *IA PERS Occupation Class* or *IA PERS Termination Indicator* field is eligible to appear on the Iowa PERS Report.

- **6** After making your entries, click **Save** to save them.
- 7 Repeat these steps for each employee who will be included in the report.

# **Deduction Code Setup for Iowa PERS Reporting**

To set up the IA PERS Deduction code for Iowa PERS reporting, follow these steps:

- 1 Navigate to Maintenance > Human Resources > Deductions and Benefits Maintenance > Deductions. The Deduction List page will open.
- 2 Highlight a deduction.
- 3 Click the **User-Defined Fields** button. The Deduction Code User Defined Fields page for the selected deduction will open:





- 4 Under the **IPERS Report** header, check the *IA PERS Deduction* box if PERS wages will be applied to the selected deduction code in PERS reporting.
- 5 Click Save.
- 6 Repeat these steps for all appropriate deductions.

#### Create Iowa PERS Data

Once you have set up the necessary user-defined fields, you will be ready to create an on-screen work file of retirement system data that will be available for the lowa PERS Report. 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 > IA > Create IPERS Data:



2 Make entries in the appropriate fields. The following table contains descriptions of the fields:

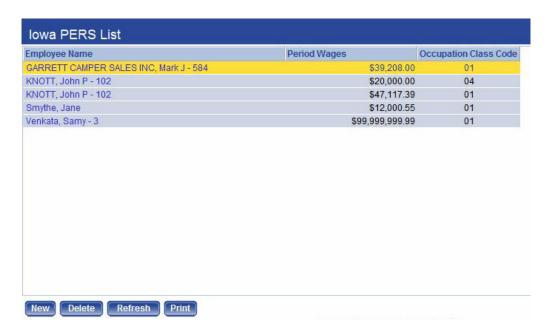
Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click <b>Save</b> , a popup will ask you to name the report. Type the name, and click <b>OK</b> . The next time you want to run this report, select its name from the <i>Load Saved Report</i> dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title of the report (IPERS Periodic Wage Detail).
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . Click the dropdown prompt to select the group, 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.
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt v to select the group. To create a new e-mail group, click 15.
From Check Date	Required. The first check date that will be included in the report data.
To Check Date	Required. The last check date that will be included in the report data.

- **3** After making your selections, click the **Submit** button.
- 4 A message will be displayed, 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 system data will populate the work file, and the lowa PERS List page will open (see next section).

# **Iowa PERS List**

The lowa PERS List page lets you review and modify retirement system data for each employee within the organization. After you create the data (see previous section, Create lowa PERS Data), this page opens automatically. You also may open this page by going to **Human Resources** > **State Requirements** > **IA** > **IPERS List**:



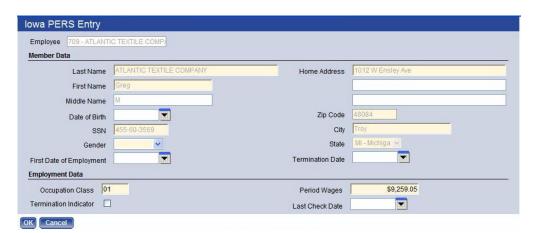


Data results are listed in a grid containing employee names and associated period wages and occupation class codes. The data is sorted alphabetically by *Employee Name*.

The grid contains one entry per employee per class code. An employee may be listed more than once if the class codes are different.

#### Add and Edit Member Information

1 If you need to add an employee to the Iowa PERS List, click the **New** button; if you want to edit data for a particular employee, click the hyperlinked *Employee Name*. In both cases, the Iowa PERS Entry popup will open:





The fields located in the **Member Data** section of the page are disabled in edit mode, enabled in add mode. The fields located in the **Employment Data** section are enabled in edit and add modes.



2 Make entries in the appropriate fields. The following table contains descriptions of the fields:

Field	Description		
Employee	ID of the IPERS member whose wages are being reported. When the page		
	is in add mode, selecting the ID automatically populates the fields		
	located in the <b>Member Data</b> section.		
Member Data			
Last Name	Last name, first name and middle initial of the IPERS member. Last		
First Name	and first name are required. The last name may contain 20 charac-		
Middle Name	ters, the first name 19 and the middle initial one.		
Date of Birth	Required. IPERS member's date of birth, taken from <i>Employee</i>		
	Maintenance/Workforce Administration or entered manually for a		
	non-employee record.		
SSN	Required. Social security number of the IPERS member whose wages are being reported.		
Gender	Required. IPERS member's gender, taken from Employee Mainte-		
	nance/Workforce Administration or entered manually for a non-		
	employee record.		
First Date of Employ-	Required. IPERS member's hire date, taken from Employee Mainte		
ment	nance/Workforce Administration or entered manually for a non-		
	employee record.		
Home Address	Complete address of the IPERS member. The first field of the Home		
Zip Code	Address and the Zip Code, City and State are required. Each Home  Address field may contain 30 characters, the city 20.		
City	Address field may contain 50 characters, the city 20.		
State			
Termination Date	IPERS member's termination date, taken from Employee Mainte-		
	nance/Workforce Administration or entered manually for a non-		
	employee record. If this date is entered, a <i>Last Check Date</i> is		
	required.		
Employment Data	"		
Occupation Class	Classification code tied to the IPERS member's reported wage.		
	Taken from the <b>User-Defined</b> frame of the Employee Maintenance		
	page (or the <b>Employment</b> tab in <i>Workforce Administration</i> ), this code determines the rate used to calculate contributions for the		
	member and employer. The field holds two characters.		
Period Wages	IPERS-covered wages the member earned during the reporting		
i ciiou wayes	period. Selected by deduction gross, this field holds ten charac-		
	ters, including two decimal places.		
	ll tara,ading the decimal process.		



Field	Description
Termination Indicator	Tells whether IPERS membership has been terminated. If the IA PERS Termination Indicator box is checked on the <b>User-Defined</b> frame of the Employee Maintenance page (or the <b>Employment</b> tab in Workforce Administration), this box will be checked automatically.
Last Check Date	IPERS member's last check date. If this date is entered, a <i>Termina-tion Date</i> is required.

**3** After making your entries, click **OK** to save them and update the grid on the lowa PERS List page.

# **Iowa PERS Report**

The following steps show you how to generate the lowa PERS Report:

From the lowa PERS List page, click the Print button, or navigate to Human Resources > State Requirements > IA > IPERS Report:



2 Make entries in the appropriate fields. The following table describes each field:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click <b>Save</b> , a popup will ask you to name the report. Type the name, and click <b>OK</b> . 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. You may save as many templates as you would like.
Override Report Title	Overrides the default title of the report (IPERS Periodic Wage Detail).
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . Click the dropdown prompt to select the group, 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.



Field	Description		
Email Group	A group of people selected to receive the report by e-mail. Click		
	the dropdown prompt 💌 to select the group. To create a new e-		
	mail group, click 艝.		
Employer ID	Required. State-assigned number identifying the employer.		
Create Transmittal File	Determines whether a transmittal file will be generated with the		
	report. Check this box to generate the file.		
Wage Report Month	Required. Two-digit month of the reporting period.		
Wage Report Year	Required. Four-digit year of the reporting period.		

**3** After making your entries, click **Print** to generate and display the report. A PDF of the report will be submitted to *myReports*. If you checked the *Create Transmittal File* box, a transmittal file of the report data also will be sent to *myReports*.

# Sample IPERS Periodic Wage Detail Report

	IPERS Periodic Wage Detail					
Employer	ID: 12345	Reporting Period: 1/1/2007 - 1/1/2008				
SSN	Last Name	First Name	М	Occ Class	Wages	Term
457-25-7879	GARRETT CAMPER SALES INC	Mark	J	01	\$39,208.00	N
456-80-6151	KNOTT	John	P	04	\$20,000.00	N
456-80-6151	KNOTT	John	P	01	\$47,117.39	N
123-45-6789	Smythe	Jane		01	\$12,000.55	N
987-98-7987	Venkata	Samy		01	\$99,999,999.99	N



# **Iowa Fire and Police Retirement Report Setup**

The lowa Fire and Police Retirement Report requires the setup of user-defined fields in *Deductions and Benefits Maintenance*. These fields accommodate employee retirement contributions made through payroll deductions.

#### Deduction Code User-Defined Field

One section header and one user-defined deduction code need to be set up for the lowa Fire and Police Retirement Report. The user-defined deduction code will appear under the section header on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*:

Section Header

**IA Fire and Police Retirement Report** 

Check Box

**IA Fire and Police Retirement** 

### **Deduction Section Header Setup**

To set up the section header that will group the user-defined deduction code check box on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow these steps:

- 1 Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
- **2** Select **Deduction** 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 deduction code section headers.
- 4 Click **New**. The User-Defined Fields Section Header popup will open.
- 5 For Section Header, type IA Fire and Police Retirement Report. (The user-defined check box that you will create for the lowa Fire and Police Retirement Report will appear under this header on the Deduction Code User-Defined Fields page in Deductions and Benefits Maintenance.)
- 6 Sequence Number is optional. Use it to tell where you want the IA Fire and Police Retirement Report section to appear in relation to other sections on the Deduction Code User-Defined Fields page in Deductions and Benefits Maintenance; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the IPERS Report section to appear below those sections, select 4 from the dropdown. If you want the section to appear somewhere in between, you will need to 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 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 **IA Fire and Police Retirement Report** section header.



# **Deduction Code Check Box Setup**

To set up the user-defined check box that will be part of the **IA Fire and Police Retirement Report** section on the Deduction Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow these steps:

- 1 Navigate to Maintenance > Logos 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 deduction code fields.
- 4 Click **New**. The User-Defined Fields popup will open.
- **5** Complete the fields **exactly** as follows:

Field	Value
Name	IA Fire and Police Retirement
Section Header	IA Fire and Police Retirement Report
Sequence Number	(Optional)
Data Type	Check Box

#### 6 Click OK.

The **Deduction** Attributes grid on the User-Defined Field List page should contain a row for the check box you have saved as part of the **IA Fire and Police Retirement Report** section on the Deduction Code User-Defined Fields page in **Deductions** and **Benefits** Maintenance:





### Benefit Code User-Defined Field

One section header and one user-defined benefit code need to be set up for the lowa Fire and Police Retirement Report. The user-defined benefit code will appear under the section header on the Benefit Code User-Defined Fields page in *Deductions and Benefits Maintenance*:

Section Header

**IA Fire and Police Retirement Report** 

Check Box

**IA Fire and Police Retirement** 

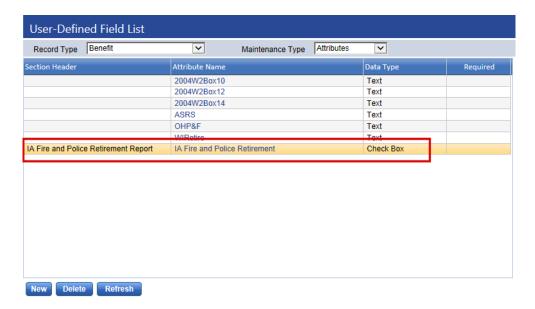
### **Benefit Section Header Setup**

To set up the section header that will group the user-defined benefit code check box on the Benefit Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow steps 1-7 on page 16, replacing *Deduction* with *Benefit* in step 2.

### **Benefit Code Check Box Setup**

To set up the user-defined check box that will be part of the **IA Fire and Police Retirement Report** section on the Benefit Code User-Defined Fields page in *Deductions and Benefits Maintenance*, follow steps 1-6 on page 17, replacing **Deduction** with **Benefit** in step 2.

When you are finished, the **Benefit** Attributes grid on the User-Defined Field List page should contain a row for the check box you saved as part of the **IA Fire and Police Retirement Report** section on the Benefit Code User-Defined Fields page in *Deductions and Benefits Maintenance*:

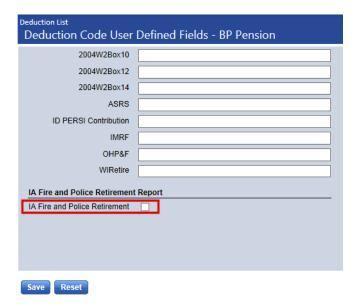




# Deduction Code Setup for Iowa Fire and Police Retirement Reporting

To set up the *IA Fire and Police Retirement* deduction code for Iowa Fire and Police Retirement reporting, follow these steps:

- 1 Navigate to Maintenance > Human Resources > Deductions and Benefits Maintenance > Deductions. The Deduction List page will open.
- 2 Highlight a deduction.
- 3 Click the **User-Defined Fields** button. The Deduction Code User Defined Fields page for the selected deduction will open:



- 4 Under the IA Fire and Police Retirement Report header, check the IA Fire and Police Retirement box if wages will be applied to the selected deduction code in IA Fire and Police Retirement reporting.
- 5 Click Save.
- **6** Repeat these steps for all appropriate deductions.

# Benefit Code Setup for Iowa Fire and Police Retirement Reporting

To set up the *IA Fire and Police Retirement* benefit code for lowa Fire and Police Retirement reporting, follow the steps above, replacing references to **Deduction(s)** with **Benefit(s)**.

Each employee who has at least one deduction or one benefit that has the *IA Fire and Police Retirement* check box selected will appear on the report.

# **Create Iowa Fire and Police Retirement Report**

Once you have set up the necessary user-defined fields, follow these steps to create the lowa Fire and Police Retirement Report:



Navigate to Human Resources > State Requirements > IA > Fire and Police Retirement Report:



2 Make entries in the appropriate fields. The following table contains descriptions of the fields:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you
	click <b>Save</b> , a popup will ask you to name the report. Type the name, and
	click <b>OK</b> . The next time you want to run this report, select its name from
	the Load Saved Report dropdown, and the fields and list boxes will be
	populated automatically. If necessary, you may edit entries before run-
	ning the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title of the report (lowa Fire and Police
	Retirement Report).
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . Click
	the dropdown prompt 📝 to select the group, 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.
Email Group	A group of people selected to receive the report by e-mail. Click
	the dropdown prompt 📝 to select the group. To create a new e-
	mail group, click 🛍.
From Date	Required. The first check date that will be included in the report
	data.
To Date	Required. The last check date that will be included in the report
	data.
Employer Name	Employer name.
Create Transmittal File	Select to have a transmittal file of the data sent to myReports.

3 After making your selections, click the **Print** button. The report will be generated and displayed. If you selected the *Create Transmittal File* check box, a transmittal file of the data will be sent to myReports.



# Sample Iowa Fire and Police Retirement Report

