



Iowa State Requirements

Training/User Guide

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Printed in the United States of America

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 Iowa 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.



NOTE:

*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 Iowa 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:

- 5 For *Section Header*, type **IPERS Report**. The user-defined text fields that you will create for the Iowa PERS Report will be grouped under this header on the Employee User-Defined page in *Employee Maintenance* (or the **Employment** tab in *Workforce Administration*).
- 6 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:

User-Defined Field List

Record Type: Maintenance Type:

Section Header	Sequence	Section Header
	1	IPERS Report
	5	Tax Information

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:

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

User-Defined Field List

Record Type: Maintenance Type:

Section Header	Attribute Name	Data Type	Required
	1099-R	Text	
	Benefit Code	Validation Set	✓
	County Gender	Validation Set	✓
	Date of Entry in Ret Fund	Date	
	Drink Coffee?	Check Box	
	Federal Tax ID	Text	
	Hair Color	Text	
	Last Compensation Review	Date	
	Last Performance Review	Date	
	Local Emp.	Check Box	
	Medical Condition	Text	
	Pet's Name	Text	
	Shoe Size	Numeric	
	Sick Accrual Date	Date	✓

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

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

Field	Value
<i>Name</i>	IA PERS Occupation Class
<i>Section Header</i>	IPERS Report
<i>Sequence Number</i>	(Your choice.)
<i>Data Type</i>	Text
<i>Maximum Length</i>	2
<i>Required</i>	(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
<i>Name</i>	IA PERS Termination Indicator
<i>Section Header</i>	IPERS Report
<i>Sequence Number</i>	(Your choice.)
<i>Data Type</i>	Text
<i>Maximum Length</i>	1
<i>Required</i>	(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:

User-Defined Field List

Record Type: Employee Maintenance Type: Attributes

Section Header	Attribute Name	Data Type	Required
	Federal Tax ID	Text	
	Hair Color	Text	
	Last Compensation Review	Date	
	Last Performance Review	Date	
	Local Emp.	Check Box	
	Medical Condition	Text	
	Pet's Name	Text	
	Shoe Size	Numeric	
	Sick Accrual Date	Date	✓
	Soda Drinker	Text	✓
	Temp Assignment Date	Date	
	Hat Size	Numeric	
IPERS Report	IA PERS Occupation Class	Text	✓
IPERS Report	IA PERS Termination Indicator	Text	✓

New Delete Refresh

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:

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 **IPERS Report**. (The user-defined check box that you will create for the Iowa 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
<i>Name</i>	IA PERS Deduction
<i>Section Header</i>	IPERS Report
<i>Sequence Number</i>	1
<i>Data Type</i>	Check Box
<i>Maximum Length</i>	(Selecting a Data Type of Check Box will hide this field.)
<i>Required</i>	(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*:

User-Defined Field List			
Record Type	Maintenance Type		
Deduction	Attributes		
Section Header	Attribute Name	Data Type	Required
	PERS Class 2	Check Box	
	Quantity	Quantity	
	SCRS Class 2	Check Box	
	SORP	Check Box	
IPERS Report	IA PERS Deduction	Check Box	
OR PERS	OR MPPT Contribution	Check Box	
OR PERS	OR MPAT Contribution	Check Box	
OR PERS	OR Unit Contribution	Check Box	
MI State Requirements	MERS Barg Unit	Validation Set	
NH ERS	NH ERS Additional PostTax	Check Box	
NH ERS	NH ERS Additional PreTax	Check Box	
NH ERS	NH ERS Current PostTax	Check Box	
NH ERS	NH ERS Current PreTax	Check Box	
NH ERS	NH ERS SPC Payment	Check Box	

New Delete Refresh

Employee Setup for Iowa PERS Reporting

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

1. 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:

Employee List	
Employee - Miller, Steven A (441)	
Attribute	User Defined
Employee	Miller, Steven A (441)
1099-R	
Federal Tax ID	
Time & Attendance User	y
IPERS Report	
IA PERS Occupation Class	
IA PERS Termination Indicator	

Save Reset

- 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:

Deduction List
Deduction Code User Defined Fields - 108

2004W2Box10	<input type="text"/>
2004W2Box12	<input type="text"/>
2004W2Box14	<input type="text"/>
AKPERS	<input type="text"/>
ASRS	<input type="text"/>
GARS	<input type="checkbox"/>
IMRF	<input type="text"/>
INPERF	<input type="text"/>
JSRS	<input type="checkbox"/>
MNPERA	<input type="text"/>
Monetary	<input type="text"/>
PORS Class 1	<input type="checkbox"/>
PORS Class 2	<input type="checkbox"/>
Quantity	<input type="text"/>
SCRS Class 2	<input type="checkbox"/>
SORP	<input type="checkbox"/>
IPERS Report	
IA PERS Deduction	<input type="checkbox"/>

- 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 Iowa 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**:

Create Iowa PERS Data

Load Saved Report <input type="text"/>	Distribution Group <input type="text"/>
Override Report Title <input type="text"/>	Email Group <input type="text"/>
From Check Date <input type="text"/>	
To Check Date <input type="text"/>	

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

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> 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.
<i>Override Report Title</i>	Overrides the default title of the report (IPERS Periodic Wage Detail).
<i>Distribution Group</i>	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.
<i>Email Group</i>	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  .
<i>From Check Date</i>	Required. The first check date that will be included in the report data.
<i>To Check Date</i>	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 Iowa PERS List page will open (see next section).

Iowa PERS List

The Iowa 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 Iowa PERS Data), this page opens automatically. You also may open this page by going to **Human Resources > State Requirements > IA > IPERS List**:

Iowa PERS List		
Employee Name	Period Wages	Occupation Class Code
GARRETT CAMPER SALES INC, Mark J - 584	\$39,208.00	01
KNOTT, John P - 102	\$20,000.00	04
KNOTT, John P - 102	\$47,117.39	01
Smythe, Jane	\$12,000.55	01
Venkata, Samy - 3	\$99,999,999.99	01

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:

Iowa PERS Entry	
Employee 709 - ATLANTIC TEXTILE COMP	
Member Data	
Last Name ATLANTIC TEXTILE COMPANY	Home Address 1012 W Ensley Ave
First Name Greg	
Middle Name M	
Date of Birth	Zip Code 48084
SSN 455-60-3569	City Troy
Gender	State MI - Michiga
First Date of Employment	Termination Date
Employment Data	
Occupation Class 01	Period Wages \$9,259.05
Termination Indicator	Last Check Date
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

NOTE:

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
<i>Employee</i>	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 Member Data section.
<i>Member Data</i>	
<i>Last Name</i>	Last name, first name and middle initial of the IPERS member. Last and first name are required. The last name may contain 20 characters, the first name 19 and the middle initial one.
<i>First Name</i>	
<i>Middle Name</i>	
<i>Date of Birth</i>	Required. IPERS member's date of birth, taken from <i>Employee Maintenance/Workforce Administration</i> or entered manually for a non-employee record.
<i>SSN</i>	Required. Social security number of the IPERS member whose wages are being reported.
<i>Gender</i>	Required. IPERS member's gender, taken from <i>Employee Maintenance/Workforce Administration</i> or entered manually for a non-employee record.
<i>First Date of Employment</i>	Required. IPERS member's hire date, taken from <i>Employee Maintenance/Workforce Administration</i> or entered manually for a non-employee record.
<i>Home Address</i>	Complete address of the IPERS member. The first field of the <i>Home Address</i> and the <i>Zip Code</i> , <i>City</i> and <i>State</i> are required. Each <i>Home Address</i> field may contain 30 characters, the city 20.
<i>Zip Code</i>	
<i>City</i>	
<i>State</i>	
<i>Termination Date</i>	IPERS member's termination date, taken from <i>Employee Maintenance/Workforce Administration</i> or entered manually for a non-employee record. If this date is entered, a <i>Last Check Date</i> is required.
<i>Employment Data</i>	
<i>Occupation Class</i>	Classification code tied to the IPERS member's reported wage. Taken from the User-Defined frame of the Employee Maintenance page (or the Employment 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.
<i>Period Wages</i>	IPERS-covered wages the member earned during the reporting period. Selected by deduction gross, this field holds ten characters, including two decimal places.

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

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



Iowa PERS Report

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

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

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

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> 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.
<i>Override Report Title</i>	Overrides the default title of the report (IPERS Periodic Wage Detail).
<i>Distribution Group</i>	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
<i>Email Group</i>	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  .
<i>Employer ID</i>	Required. State-assigned number identifying the employer.
<i>Create Transmittal File</i>	Determines whether a transmittal file will be generated with the report. Check this box to generate the file.
<i>Wage Report Month</i>	Required. Two-digit month of the reporting period.
<i>Wage Report Year</i>	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

<p style="text-align: center;">New World Company IPERS Periodic Wage Detail Reporting Period: 1/1/2007 - 1/1/2008</p>							
Employer ID: 12345							
SSN	Last Name	First Name	M	Occ Class	Wages	Term Code	
457-25-7879	GARRETT CAMPER SALES INC.	Mark	J	01	\$39,208.00	N	
456-80-5151	KNOTT	John	P	04	\$20,000.00	N	
456-80-5151	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 Iowa 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 pay-roll deductions.

Deduction Code User-Defined Field

One section header and one user-defined deduction code need to be set up for the Iowa 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 Iowa 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
<i>Name</i>	IA Fire and Police Retirement
<i>Section Header</i>	IA Fire and Police Retirement Report
<i>Sequence Number</i>	(Optional)
<i>Data Type</i>	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*:

User-Defined Field List			
Record Type Deduction		Maintenance Type Attributes	
Section Header	Attribute Name	Data Type	Required
	2004W2Box10	Text	
	2004W2Box12	Text	
	2004W2Box14	Text	
	ASRS	Text	
	ID PERSI Contribution	Text	
	IMRF	Text	
	OHP&F	Text	
	WIPRetire	Text	
IA Fire and Police Retirement Report	IA Fire and Police Retirement	Check Box	
<div> New Delete Refresh </div>			

Benefit Code User-Defined Field

One section header and one user-defined benefit code need to be set up for the Iowa 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*:

User-Defined Field List			
Record Type	Benefit	Maintenance Type	Attributes
Section Header	Attribute Name	Data Type	Required
	2004W2Box10	Text	
	2004W2Box12	Text	
	2004W2Box14	Text	
	ASRS	Text	
	OHP&F	Text	
	WIPRetire	Text	
IA Fire and Police Retirement Report	IA Fire and Police Retirement	Check Box	

New Delete Refresh

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 Iowa 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 Iowa Fire and Police Retirement Report:


- 1 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
<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> 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.
<i>Override Report Title</i>	Overrides the default title of the report (Iowa Fire and Police Retirement Report).
<i>Distribution Group</i>	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.
<i>Email Group</i>	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 👁.
<i>From Date</i>	Required. The first check date that will be included in the report data.
<i>To Date</i>	Required. The last check date that will be included in the report data.
<i>Employer Name</i>	Employer name.
<i>Create Transmittal File</i>	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

Iowa Fire and Police Retirement Report - Internet Explorer				
<div><div></div><div><div>Iowa Fire and Police Retirement Report</div><div>Check Date Range 01/01/15 - 02/08/16</div></div></div>				
Employee	SSN	Deduction Amount	Benefit Amount	Earmark Compensation
2469 Abdul, Wayne A	737-13-3280	18.00	.00	.00
583 Abdul, Wayne Samuel	471-44-1524	50.00	.00	.00
2966 Addar, Isaac A	548-47-2029	35.00	.00	.00
2674 Andersen, Pierre E	668-21-4856	45.00	.00	.00
565 Anich, Diane W	797-13-1875	40.00	.00	.00
2287 Babbie, James	596-71-3130	40.00	.00	.00
2003 Bazzell, Quentin A	879-48-2272	40.00	.00	.00
1305 Benne, Chelise D	808-80-0079	40.00	.00	.00
752 Berni, Agustin R	646-61-8232	35.00	.00	.00
2959 Billa, Helen A	077-05-0388	40.00	.00	.00
3187 Bohmer, Raina S	582-84-8794	40.00	.00	.00
1558 Bottmeyer, Nadia G	735-36-9608	40.00	.00	.00
1048 Bourin, Reagan S	657-60-3066	91.85	.00	.00
2480 Boze, Ramon R	509-25-3126	40.00	.00	.00
3320 Buschmann, Keith W Jr	562-97-6805	40.00	.00	.00
3054 Bushfield, Jaden D	582-48-2339	40.00	.00	.00
729 Campisi, Evan L	153-03-2622	80.00	.00	.00
2808 Capotelli, Amari T	582-03-6117	40.00	.00	.00
1889 Carrizosa, Veronica J	188-79-4228	35.00	.00	.00
2087 Castillon, Beta D	077-27-6103	35.00	.00	.00
1224 Ceyer, Deon T	042-21-8030	40.00	.00	.00
2218 Chantillon, Nathalia T	151-48-8148	35.00	.00	.00
1256 Chet, Todd E	058-26-1187	40.00	.00	.00
3050 Chmer, Connor J	544-30-5961	45.00	.00	.00
3099 Colantonio, Gustavo R Jr	262-64-4835	35.00	.00	.00
3071 Conry, Spencer A	058-27-4038	40.00	.00	.00
1758 Coulter, Kara H	242-24-0515	66.80	.00	.00
3327 Crable, Katrina K	582-10-3951	35.00	.00	.00
2143 Crouff, Brandon T	285-66-7803	45.00	.00	.00
1786 Czartoryski, Marlee C Jr	582-42-2159	45.00	.00	.00
1499 Daniels, Bryan R	124-41-4779	35.00	.00	.00
2011 Dembowski, Christy D	038-35-4941	35.00	.00	.00
2045 Denburger, Payton M	664-91-5451	35.00	.00	.00
2803 Drago, Livio Test	056-86-1425	35.00	.00	.00
2005 Ennett, Sabrina E	259-13-2087	35.00	.00	.00
3223 Enner, Tina A	526-94-4403	35.00	.00	.00
2476 Fiers, Kalyan E	881-23-2746	35.00	.00	.00
2582 Figgins, Howard J	887-03-6935	35.00	.00	.00
2298 Filburn, Seamus P	431-21-2165	35.00	.00	.00
802 Fishburner, Ashley E	346-03-2166	35.00	.00	.00
263 Fishburn, Eliot D	289-69-8807	35.00	.00	.00
920 Gage, Anika W	185-53-9138	58.45	.00	.00
1785 Goldmann, Lillian L	232-30-5628	35.00	.00	.00
1728 Goldthwaite, Delia A	727-40-1488	35.00	.00	.00
748 Golsink, Emma D Jr	582-42-4188	35.00	.00	.00
2004 Griffin, Raymond A	728-69-6903	35.00	.00	.00
1874 Grooms, Jacquelyn A	276-45-4821	35.00	.00	.00
1487 Guse, Robin E	732-26-7131	35.00	.00	.00
924 Hackler, Essence R	582-58-6815	35.00	.00	.00

