

Kentucky State Requirements

User Guide

Release 7.0 SP2 and FP5

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CHAPTERNW

1

REPORTS

Overview

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

- http://www.kewes.ky.gov
- http://kyret.ky.gov/index.php/employers/start/
- **1** "Kentucky Quarterly Tax and Wage Report" on page 1-2.
- **2** "Kentucky Retirement Report" on page 1-5.
- **3** "Kentucky Retirement Maintenance" on page 1-7.
- **4** "Kentucky Retirement List" on page 1-10.



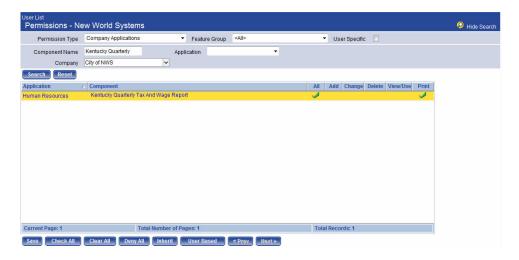
Kentucky Quarterly Tax and Wage Report

The "Kentucky Quarterly Tax and Wage Report" page enables authorized users to submit wage information electronically to the State and to run a report to verify the information.

Security

Maintenance > Logos Suite > Security > Users

A security component, Kentucky Quarterly Tax and Wage Report, exists for the report:



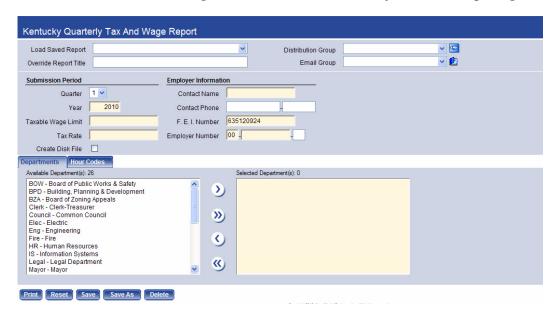
Give permission to the users who should have access to this feature, and click

[Save] to retain the settings. The new authorization will take effect once the user has logged off and back on to the system.



Running the Report

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

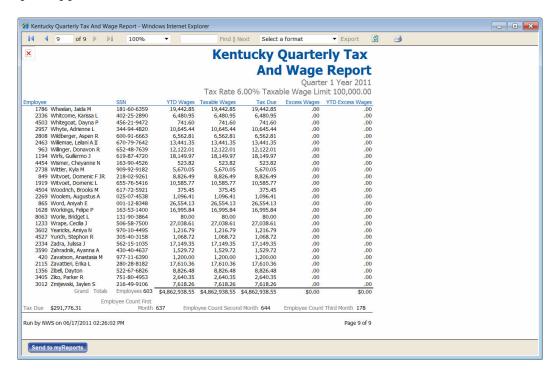


- **1** Select the *Quarter* for which you want to run the report.
- **2** The *Year* is required. The current year is the default value. Specify the year for the quarter you have chosen.
- **3** Specify the *Taxable Wage Limit* for the report. This value is required. Taxable wages beyond the limit defined will be reported as excess wages. The acceptable range is \$.01 through \$999,999.99.
- **4** Enter the *Tax Rate* used to calculate the tax due. This value is required; the acceptable range is 0.001% through 99.999%.
- **5** Select the *Create Disk File* check box if you want to create a transmittal file in addition to the print version.
- **6** The *Contact Name* is the person whom the state can contact if there are questions or concerns about the quarterly wage information. This value is required; it may contain up to 30 characters.
- 7 The *F.E.I.* (Federal Employer Identification) *Number* field displays the Federal Tax ID number defined in Company Suite Settings. This value is required and contains nine digits.
- **8** The *Employer Number* is required. It is made up of a two-digit prefix, a six-digit employer number, and an optional one-character suffix. This number is assigned by the agency that will receive the report.
- **9** At least one *Department* must be selected for the report. Select the departments you want to include in the output.
- **10** At least one *Hours Code* must be selected for the report. Select the hours codes used to calculate taxable wages.
- **11** Click **Pint** to send the listing to myReports.



Report Output

Generated via the "Kentucky Quarterly Tax and Wage Report" page, the report provides users with information detailing year-to-date, quarterly, taxable, excess, and year-to-date excess employee wages for the quarter and year selected. A sample report appears below.





Kentucky Retirement Report

The Kentucky Retirement Report allows users to create a transmittal file that is used to download data monthly to the Kentucky retirement system. It also creates a report that organizations can use to verify the transmittal file information.

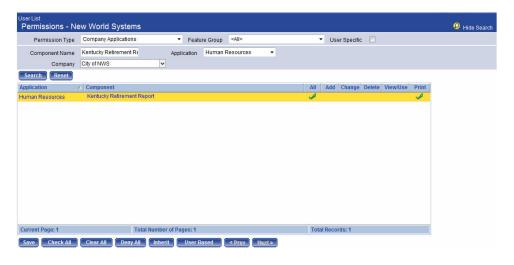


This is an old version of the report that will be invalid some time in 2011 (date to be determined). After that date, use the "Kentucky Retirement Maintenance" on page 1-7 to set up the report, and use "Kentucky Retirement List" on page 1-10 to generate the new report and the transmittal file.

Security

Maintenance > Logos Suite > Security > Users

A security component, Kentucky Retirement Report, exists for the report:



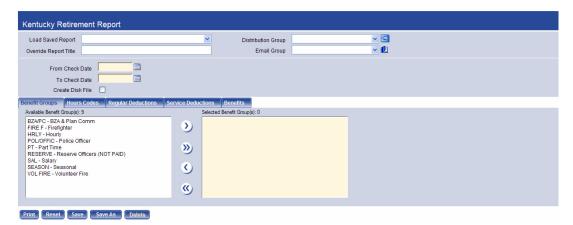
Give permission to the users who should have access to this feature, and click save to retain the settings. The new authorization will take effect once the user has logged off and back on to the system.

Running the Report

Human Resources > State Requirements > KY > Kentucky Retirement Report



When you select the Kentucky Retirement Report, you will see a screen like the following:



- **1** A check date range is required. Enter a *From Check Date* and *To Check Date* value.
- **2** Select the *Create Disk File* check box if you want to create a transmittal file in addition to the print version.
- **3** At least one *Benefit Group* must be selected for the report. Select the benefit groups you want to include in the output.
- **4** At least one *Hours Code* must be selected for the report. Select the hours codes you want to include in the output.
- **5** At least one *Regular Deduction* must be selected for the report. Select the regular deductions you want to include in the output.
- **6** At least one *Service Deduction* must be selected for the report. Select the service deductions you want to include in the output.
- **7** At least one *Benefit* must be selected for the report. Select the benefits you want to include in the output.



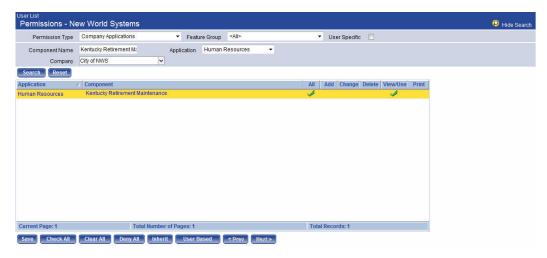
Kentucky Retirement Maintenance

The Kentucky Retirement Maintenance page allows organizations to maintain the reporting values used consistently in retirement reports.

Security

Maintenance > Logos Suite > Security > Users

A security component, Kentucky Retirement Maintenance, exists for the report:



Give permission to the users who should have access to this feature, and click save to retain the settings. The new authorization will take effect once the user has logged off and back on to the system.

Retirement Maintenance

Company Settings Tab

This tab contains the fields that define company-level information that should be used each time this report is run.



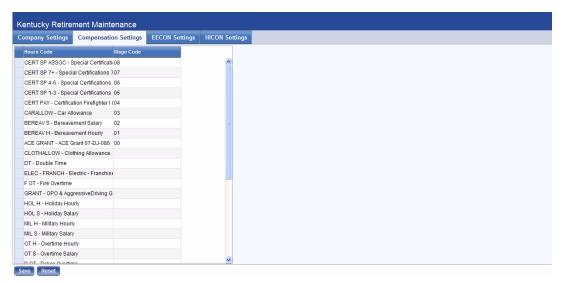
- 1 The *Employer Code* is required. It may contain up to five characters. This is the state-assigned, numeric code identifying the employer.
- **2** The *Report Type* is required. It may contain up to four characters. The possible values are as follows:
 - ▶ KERS: Kentucky Employees Retirement System
 - CERS: County Employees Retirement System



- ▶ SPRS: State Police Retirement System
- **3** The *IRS Limit* is required. The maximum value is \$9,999,999.99.

Compensation Settings Tab

This tab allows the user to define wage codes for each hours code:



To define or change a wage code, double click in that cell and update the value. The acceptable codes for compensation are as follows:

- 00 Regular Pay
- 01 Additional Creditable Compensation
- 02 Leave Without Pay
- 03 Bonus/Severance Payment
- 04 IPS Payment
- 05 Probationary Period Completion
- 06 Lump Sum Compensatory Pay
- 07 State-Funded Expenditures
- 08 Alternate Sick Leave Payment
- 09 Furlough
- 10 Layoff
- 11 Summer Months

Click **Save** to store the changed value.



EECON Settings Tab

The EECON Settings tab allows users to define employee contributions. When you click this tab, you will see the following:



Both Pre-Tax and Post-Tax EECON can be defined from this tab. Only active codes are available for selection.



A deduction that is selected for EECON cannot be used for HICON. A deduction cannot be used for both Pre-Tax EECON and Post-Tax EECON.

Click Save to store the settings.

HICON Settings Tab

The HICON Settings tab allows users to define health insurance contributions. When you click this tab, you will see the following:



Only active deduction codes are available for selection.



A deduction that is selected for HICON cannot be used for EECON.

Click Save to store the settings.



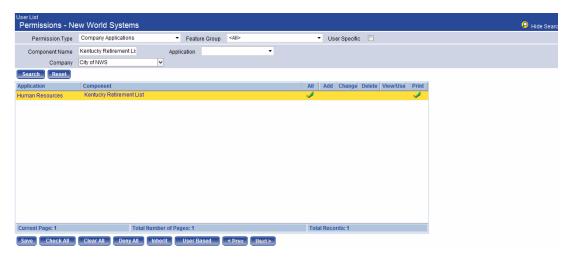
Kentucky Retirement List

The Kentucky Retirement List page allows the user to upload data each month to the Kentucky Retirement System and run a report to verify the content of the transmittal file.

Security

Maintenance > Logos Suite > Security > Users

A security component, Kentucky Retirement List, exists for the report:



Give permission to the users who should have access to this feature, and click Print to retain the settings. The new authorization will take effect once the user has logged off and back on to the system.

Setup

Maintenance > Logos Suite > Security > User-Defined Fields

Employee user-defined fields must be set up for several fields on the Kentucky Retirement Entry page. Set up the following user-defined fields, per these specifiations:



For customers who are using Workforce Administration, select **Employee Employment** from the **Record Type** control.

Field Name	Data Type	Max Length	Examples
KY Ret Contribution Group	Text	10	KNHZNH, KHZHI, CHZNH, etc.
KY Ret Member ID	Text	9	Assigned by KRS



Field Name	Data Type	Max Length	Examples
KY Ret Employment Begin Date	Date	U	•
KY Ret Employment End Date	Date		
KY Ret Employment End Reason	Text	2	 00 = Change in System, Plan, Contribution Group, or Job Position
			• 01 = Retirement
			• 02 = Death
			• 03 = Termination
			 04 = Change in Position Status
			• 05 = Transfer
KY Ret Job Position	Text	4	 0000 = Constitutional Officer with General Assembly
			• 0001 = Magistrate
			• 0002 = Coroner
			• 0003 = Mayor
			• 0004 = City Council
			 0005 = Volunteer Fireman
			• 0006 = Master Commissioner
			0007 = Jailer (Non-Haz)
			0008 = Sheriff (Non-Haz)
			• 0009 = Police (Non-Haz)
			 0010 = Fire (Non-Haz)
			• 0011 = EMS (Non-Haz)
			 0012 = General Assembly Employee
			• 0013 = Other
			 0014 = County Attorney Employee
KY Ret Position Status	Text	2	• 00 = Regular Full Time
			• 01 = Part Time
			 02 = Probationary (CERS use only)
			• 03 = Seasonal
			• 04 = Temporary
			• 05 = Emergency
			• 06 = Interim
			 07 = Regular Full Time Less Than 12 Months
			08 = Intermittent Employee

A NOTE:

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



Using the List

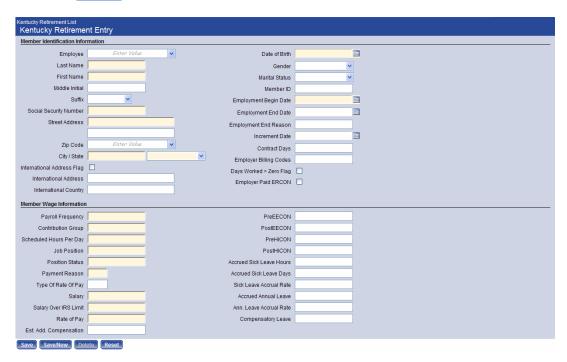
Human Resources > State Requirements > Kentucky > Kentucky Retirement List

The list allows the user to create data for a specified check date range and review the data either on screen or by a report. The user can then make changes to existing data or add new data before printing the final report and generating the transmittal file.



Each employee name is a hyperlink that allows the retirement record to be edited.

Click the New button to enter a new employee into the retirement system:



Selecting a name from the *Employee* field will populate the name, *Social Security Number*, address, *Date of Birth*, *Gender*, and *Marital Status* information.

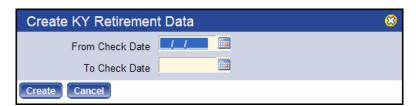


The following fields are required employee information to create a retirement entry:

- Enter an *Employment Begin Date*. This is the date on which the employee started his or her employment with the organization.
- Enter the *Payroll Frequency* for the employee.
- Enter the *Contribution Group* to which the employee belongs.
- Enter the *Scheduled Hours Per Day* the employee works.
- Enter the *Job Position* the employee holds.
- Enter the *Position Status* for the employee's job.
- Enter the *Payment Reason* code. See "Compensation Settings Tab" on page 1-8 for a list of these codes.
- Enter the employee's *Salary*.
- Enter the *Salary Over IRS Limit* amount that the employee earns.
- Enter the employee's *Rate of Pay*.

Click Save to add the employee to the retirement list.

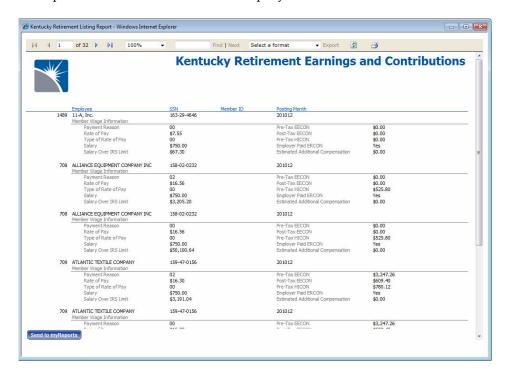
To create new retirement data, click the Q Create button. You will see the following screen:



A check date range is required. Enter a *From Check Date* and *To Check Date* and click to create retirement data for this check date range. The data will be added to the Kentucky Retirement List page.



Clicking Frint will launch an SSRS report of the list and generate a transmittal file to be uploaded via the secure KRS Employer Self-Service web site.



PROCEDURES

Overview

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

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

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



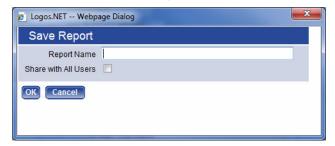
Saving Report Settings

Use this procedure to save report settings for future use.

- 1 From the Human Resources > State Requirements > KY > [Report Name] menu, select the report for which you want to save report settings. The report page displays.
- **2** Complete the controls for the report you selected as detailed in Chapter 1, "Reports."
- 3 Click the Save button to automatically save changes to an existing report template.

-OR-

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



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

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



Loading a Saved Report

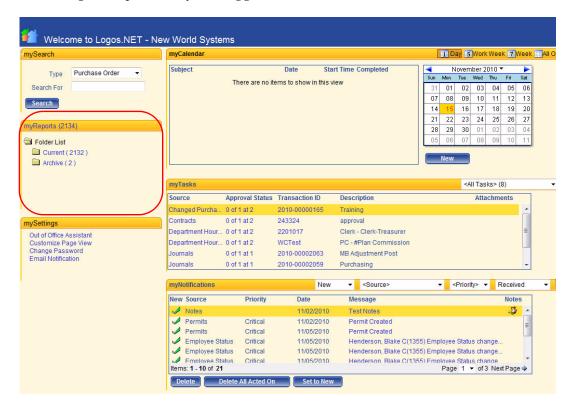
Use this procedure to load saved settings for the selected report.

- 1 From the **Human Resources** > **State Requirements** > **KY** > [Report Name] menu, select the report for which you want to load a saved report. The report page displays.
- **2** From the *Load Saved Report* control, select the name of the previously saved report template.
 - The controls update to display the saved report settings.
- **3** Make the necessary changes to the template or submit the report to **myReports**.



Printing a Report

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

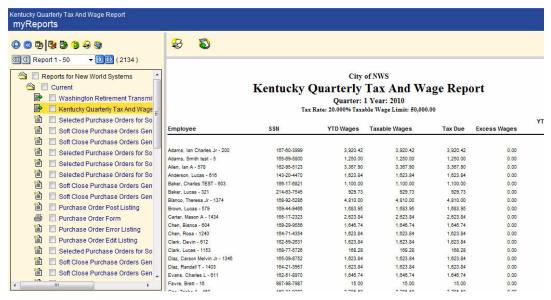


When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:





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



To print the report, click the Print icon.

Procedures

Printing a Report

