



Maryland State Requirements

Release 6.1



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Overview

This manual provides instructions for the setup and use of the Maryland State Requirements reports:

- 1 "Maryland State Retirement Report" on page p. 2
- 2 "Employee Maintenance Setup" on page p. 2
- 3 "Employee Setup for Maryland State Reporting" on page p. 3
- 4 "Maryland State Retirement Report Setup" on page p. 4
- 5 "Create Maryland Retirement Data" on page p. 6
- 6 "Add or Edit Maryland Retirement Data" on page p. 8
- 7 "Generate Maryland State Retirement Report" on page p. 9

Maryland State Retirement Report

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

Employee Maintenance Setup

The Maryland State Retirement Report requires the setup of one user-defined text field in *Employee Maintenance*. This field accommodates employee retirement contributions made through payroll deductions.

The following steps show you how to set up this field and a section header for making the field easy to locate on the Employee User-Defined page in *Employee Maintenance*:

Section Header

- 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.
- 3 Select *Section Headers* from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined section headers in Employee Maintenance.
- 4 Click **New**. The User-Defined Fields Section Header popup will open.
- 5 For *Section Header*, type **MD State Retirement Report**.
- 6 Use the *Sequence Number* field to tell where you want the section to appear in relation to other sections on the Employee User-Defined page; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the **MD State Retirement Report** section to appear below those sections, select **4** from the dropdown.

To have the section appear somewhere in between, you will need to change the sequence numbers of the other sections accordingly. Select **1** to have the section always appear at the top of the page, **99** to have it appear at the bottom.

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

User-Defined Field

To set up the user-defined field that will be part of the **MD State Retirement Report** section on the Employee User-Defined page in *Employee Maintenance*, 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.
- 3 Select *Attributes* from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined fields in Employee Maintenance.
- 4 Click **New**. The User-Defined Fields popup will open.
- 5 Complete the fields *exactly* as follows:

Field	Value
<i>Name</i>	MD System Code
<i>Section Header</i>	MD State Retirement Report
<i>Sequence Number</i>	(your choice or blank)
<i>Data Type</i>	Text
<i>Maximum Length</i>	1
<i>Required</i>	(leave unchecked)

The *MD System Code* will identify each employee's plan. (See next section, "Employee Setup for Maryland State Reporting.")

- 6 Click **OK**. The *MD System Code* field will be added to the *Employee Attributes* grid on the User-Defined Field List page.

Employee Setup for Maryland State Reporting

To set up an employee for Maryland state reporting, follow these steps:

- 1 Navigate to **Human Resources > Employee Maintenance**. The Employee List 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 reporting. The Employee page will open.
- 4 From the *Attribute* dropdown, select **User Defined**. The page will refresh to show existing user-defined fields, including an **MD State Retirement Report** section containing the text field you set up.
- 5 Make the appropriate entry in the *MD System Code* field. The following table shows the valid entries:

Entry	Description
1	Teachers' Retirement System
2	Employees' Retirement System
3	State Police Retirement System
4	Judicial Retirement System
5	Legislative Retirement System
6	Teachers' Pension System
7	Employees' Pension System
8	Law Enforcement Retirement System
9	Law Enforcement Pension System
G	Local Fire & Police Retirement System
H	Local Fire & Police Pension System

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

Maryland State Retirement Report Setup

The following steps show you how to perform the setup needed to create your state retirement data. Setup includes employer information, the hours codes that constitute pension wages and the benefits and deductions used to calculate employee and employer contributions.

- 1 Navigate to **Human Resources > State Requirements > MD > State Retirement Report Maintenance**. The Maryland State Retirement Report Maintenance page will open, with the **Company Settings** tab brought forward, as shown below:



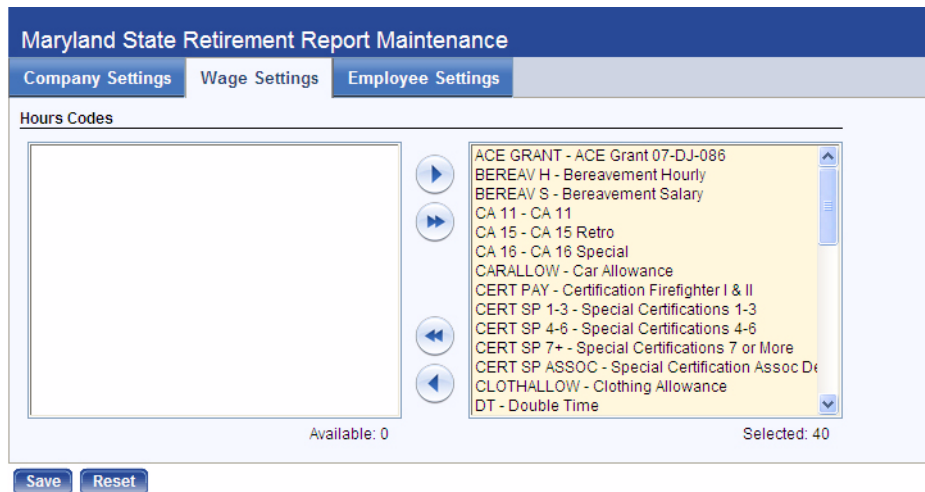
Maryland State Retirement Report Maintenance

Company Settings Wage Settings Employee Settings

Location 12345647

Save Reset

- 2 In the *Location* field, type the 8-digit code identifying the employer. The first four digits are assigned by the SRA. The last four digits may be by used by local participating governmental units or contain state appropriation codes. The last four digits, if not used by the local participating governmental units, generally are **0000**.
- 3 Click **Save**.
- 4 Click the **Wage Settings** tab to bring it forward:



Maryland State Retirement Report Maintenance

Company Settings Wage Settings Employee Settings


Hours Codes

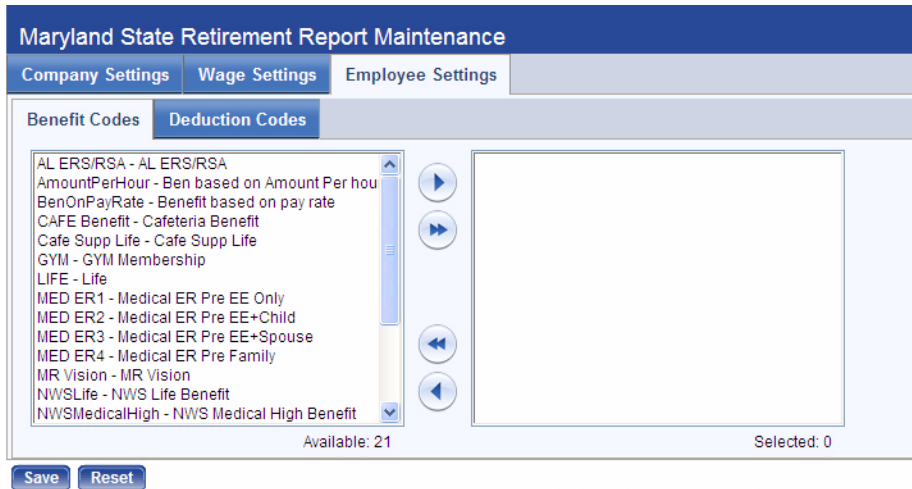
Available: 0 Selected: 40

Save Reset

ACE GRANT - ACE Grant 07-DJ-086
 BEREAV H - Bereavement Hourly
 BEREAV S - Bereavement Salary
 CA 11 - CA 11
 CA 15 - CA 15 Retro
 CA 16 - CA 16 Special
 CARALLOW - Car Allowance
 CERT PAY - Certification Firefighter I & II
 CERT SP 1-3 - Special Certifications 1-3
 CERT SP 4-6 - Special Certifications 4-6
 CERT SP 7+ - Special Certifications 7 or More
 CERT SP ASSOC - Special Certification Assoc Dt
 CLOTHALLOW - Clothing Allowance
 DT - Double Time

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

- 5 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.
- 6 Click **Save**.
- 7 Click the **Employee Settings** tab to bring it forward:



Maryland State Retirement Report Maintenance

Company Settings | **Wage Settings** | Employee Settings


Benefit Codes | **Deduction Codes**

AL ERS/RSA - AL ERS/RSA
 AmountPerHour - Ben based on Amount Per hou
 BenOnPayRate - Benefit based on pay rate
 CAFE Benefit - Cafeteria Benefit
 Cafe Supp Life - Cafe Supp Life
 GYM - GYM Membership
 LIFE - Life
 MED ER1 - Medical ER Pre EE Only
 MED ER2 - Medical ER Pre EE+Child
 MED ER3 - Medical ER Pre EE+Spouse
 MED ER4 - Medical ER Pre Family
 MR Vision - MR Vision
 NWSLife - NWS Life Benefit
 NWSMedicalHigh - NWS Medical High Benefit

Available: 21 Selected: 0

Save Reset

The **Employee Settings** tab contains multi-select list boxes for the selection of benefits and deductions that will be used when employee contributions are calculated.

- 8 Click the **Benefit Codes** or **Deduction Codes** tab to bring it forward. From the list of codes in the *Available* (left) box, select those that will be used, and click the right-arrow button  to move the codes to the *Selected* (right) box. Only active codes are available for selection.
- 9 Click **Save**.

Create Maryland 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 Maryland State Retirement 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 > MD > State Retirement Report List**. The MD State Retirement Report page will open:

MD State Retirement Report							
Employee Name	System Code	SSN	Annual Compensation	Employee Contribution	Hours Worked	Base Salary Paid	
AKINS, Joshua A - 1334		346-75-6042	0.00	0.00	0.0	150.00	
ALLIANCE EQUIPMEN, Jeffery J - 708		345-50-7667	34112.00	239.00	754.2	15751.65	
Amastar Construct, Eric L - 1378		000-87-3532	0.00	0.00	0.0	150.00	
ARMOR HOLDINGS FO, Eric M - 1337	2	344-24-7825	0.00	0.00	0.0	1512.00	
Armstrong, Mark E - 1127		595-12-5605	30160.00	0.00	80.0	1160.00	
ATLANTIC TEXTILE, Greg M - 709		348-67-7893	33571.20	2713.40	860.5	16528.16	
AUBURN ALLIANCE C, David A - 1325		345-62-9958	7300.80	0.00	80.0	540.00	
AUBURN HOMES, Phillip P - 1436		348-39-8916	9620.00	0.00	309.7	2865.19	
AYERS DISTRIBUTIN, Kathryn J - 1329		351-06-7551	27040.00	0.00	784.0	10751.03	
Baber, Michelle A - 564		348-83-8137	28808.00	2803.80	772.0	11225.43	
BACKUP TRAINING C, Ronald P - 1288		356-28-8636	12584.00	300.00	470.0	5987.01	
Bacon, Vivian J - 461		354-39-0576	0.00	3768.98	119.2	19078.54	
Baird, Danny D - 452		345-12-4722	0.00	0.00	0.0	2132.00	
Baker, Christopher W - 468		356-64-9593	0.00	7433.90	299.7	45096.24	
Baker, Martin D - 576		358-83-7742	0.00	7674.66	75.2	28105.91	
BARD, David E - 1463		358-97-3396	0.00	0.00	80.0	2559.36	
Barton, Larry D - 1157		343-86-7812	0.00	0.00	0.0	1430.00	

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.

- Click the **Create** button. The Create MD State Retirement Data popup will open:

Create MD State Retirement Data

From Pay Ending Date

To Pay Ending Date

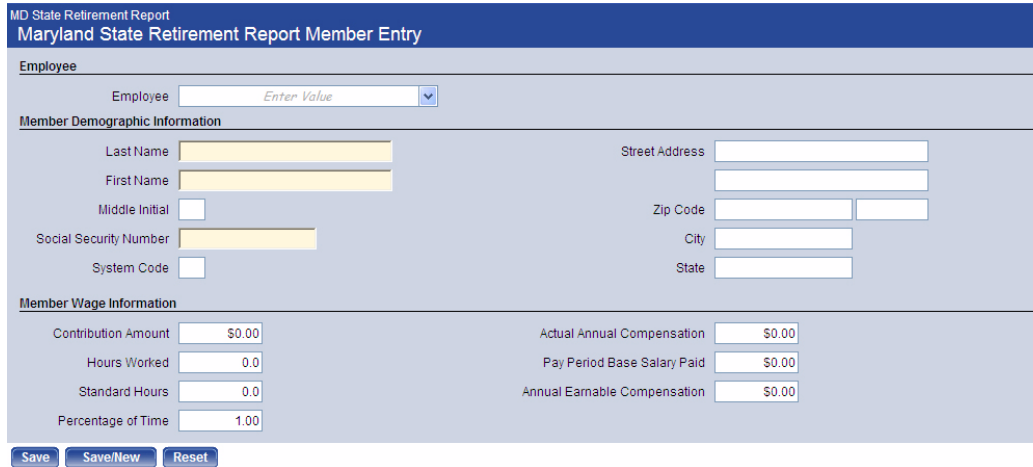
- In the *From Pay Ending Date* and *To Pay Ending Date* fields, respectively, select the first and last payroll dates that will be included in the report data.
- After making your selections, click **OK**. If a work file has been created previously, a message will display, telling you the previously created work file will be cleared and asking whether you want to continue. If you do, click Acept.

The current retirement data--including annual compensation, employer and employee contributions, the hours worked for the pay batches run within the selected period and payroll wages--will populate the work file, and the grid on the MD State Retirement Report page will refresh to show all employees who have been paid using the hours codes you set up in Maintenance.

Add or Edit Maryland Retirement Data

To add or edit Maryland retirement data, follow these steps:

- 1 If you need to add an employee to the grid on the MD State Retirement Report page, click the **New** button located below the grid; if you need to edit data for a particular employee, click the hyper-linked *Employee Name*. In either case, the Maryland State Retirement Report Member Entry page will open:



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

Field	Description
Employee	
<i>Employee</i>	ID of the retirement system member whose wages are being reported. When the page is in add mode, selecting the ID automatically populates the fields located in the Member Demographic Information section.
Member Demographic Information	
<i>Last Name</i>	Last name, first name and middle initial of the retirement system 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>Social Security Number</i>	Required. Social security number of the retirement system member whose wages are being reported.
<i>System Code</i>	Identifies an employee's retirement system plan.

Field	Description
Street Address	Complete address of the retirement system member. The first line of the <i>Street Address</i> and the <i>Zip Code</i> , <i>City</i> and <i>State</i> are required. Each <i>Street Address</i> line may contain 30 characters, the city 20.
Zip Code	
City	
State	
Member Wage Information	
Contribution Amount	Contribution dollar amount for the pay period being reported.
Hours Worked	An employee’s actual number of hours worked for the pay period being reported.
Standard Hours	Normal or regular hours for a full-time position during a pay period.
Percentage of Time	Percentage of budgeted time an employee is scheduled to work in a position.
Actual Annual Compensation	Total actual salary on an annualized basis for a full-time employee.
Pay Period Base Salary Paid	Gross recurring salary payable at the end of each pay period during the fiscal year.
Annual Earnable Compensation	Total earnable salary on an annualized basis for a full-time position.

- After making your entries, click **Save** to update the grid on the MD State Retirement Report page.

Generate Maryland State Retirement Report

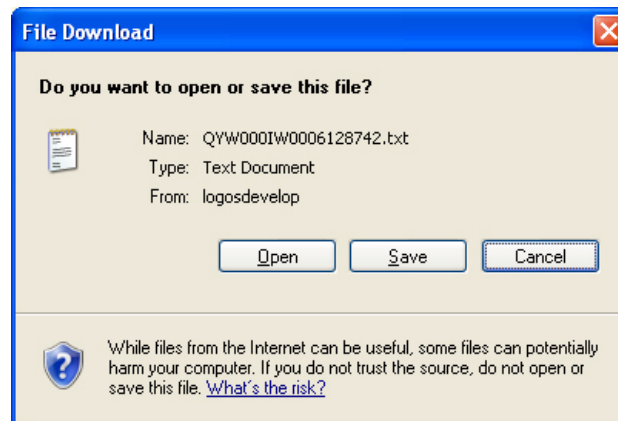
To generate and display a Maryland State Retirement Report containing the latest retirement data, click the **Print** button located below the grid on the MD State Retirement Report page. A PDF and transmittal file of the report also will be submitted to *myReports*.

Sample Maryland State Retirement Report

City of NWS
Maryland State Retirement Report
 Period Ending Date: 07/28/2009
 Location: 12345678

Employee	SSN	Actual Annual Compensation	Employee Contribution Amount	Hours Worked	Standard Hours	Percent Of Time	Pay Period Base Salary Paid	Annual Earnable Compensation
System Code:								
AKINS, JOSHUA A	346-75-6042	0.00	0.00	0.00	40.00	1.00	150.00	0.00
ALLIANCE EQUIPMEN, JEFFERY J	345-50-7667	34,112.00	239.00	754.20	80.00	1.00	15,751.65	34,112.00
AMASTAR CONSTRUCT, ERIC L	000-87-3532	0.00	0.00	0.00	40.00	1.00	150.00	0.00
ARMSTRONG, MARK E	595-12-5605	30,160.00	0.00	80.00	80.00	1.00	1,160.00	30,160.00
ATLANTIC TEXTILE, GREG M	348-67-7893	33,571.20	2,713.40	860.50	80.00	1.00	16,528.16	33,571.20
AUBURN ALLIANCE C, DAVID A	345-62-9958	7,300.80	0.00	80.00	40.00	1.00	540.00	7,300.80
AUBURN HOMES, PHILLIP P	348-39-8916	9,620.00	0.00	309.70	40.00	1.00	2,865.19	9,620.00
AYERS DISTRIBUTIN, KATHRYN J	351-06-7551	27,040.00	0.00	784.00	80.00	1.00	10,751.03	27,040.00
BABER, MICHELLE A	348-83-8137	28,808.00	2,803.80	772.00	80.00	1.00	11,225.43	28,808.00
BACKUP TRAINING C, RONALD P	356-28-8636	12,584.00	300.00	470.00	40.00	1.00	5,987.01	12,584.00
BACON, VIVIAN J	354-39-0576	0.00	3,768.98	119.20	80.00	1.00	19,078.54	0.00
BAIRD, DANNY D	345-12-4722	0.00	0.00	0.00	80.00	1.00	2,132.00	0.00
BAKER, CHRISTOPHER W	356-64-9593	0.00	7,433.90	299.70	80.00	1.00	45,096.24	0.00
BAKER, MARTIN D	358-83-7742	0.00	7,674.66	75.20	80.00	1.00	28,105.91	0.00
BARD, DAVID E	358-97-3396	0.00	0.00	80.00	40.00	1.00	2,559.36	0.00
BARTON, LARRY D	343-86-7812	0.00	0.00	0.00	40.00	1.00	1,430.00	0.00
BAUERMEISTER, TRACY M	343-16-3188	35,172.80	4,662.46	728.00	80.00	1.00	13,971.90	35,172.80
BEEBOUT, MICHAEL W	354-50-1530	0.00	1,718.16	200.20	80.00	1.00	27,925.04	0.00

To view the transmittal file, click the *Maryland State Retirement 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**.