Logos.NET®
Public Administration Software

Michigan State Requirements K-12

Release 7.0 PR 3.2/3.3
Training/User Guide

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Overview

This manual provides instructions for the setup and use of the Michigan State Requirements K-12 reports:

Michigan ORS Report

User-Defined Fields Setup

The Michigan ORS Report requires the setup of ten user-defined fields (UDFs) in *Workforce Administration*, nine that will appear on the **Employment** tab, and one that will appear on the **Jobs** tab. These fields accommodate employee retirement contributions made through payroll deductions.

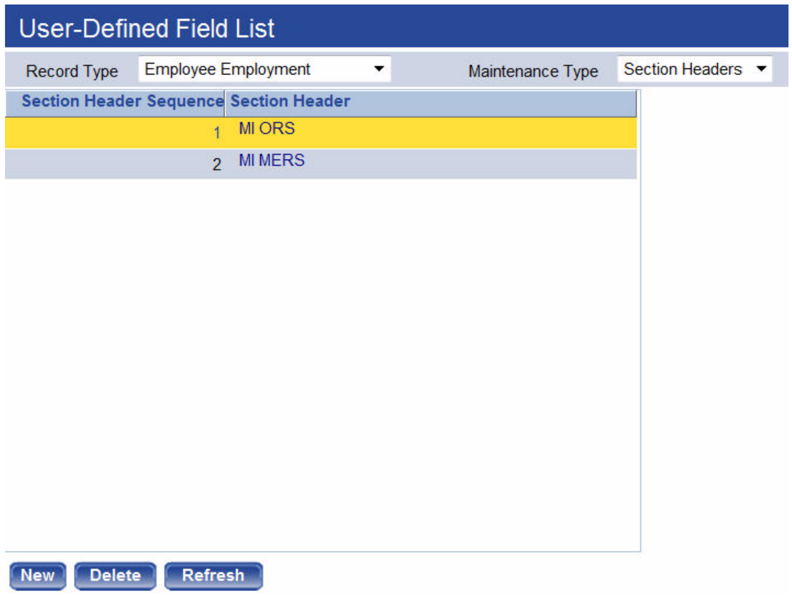
The following steps show you how to set up these fields and a section header for making them easy to locate on the **Employment** or **Jobs** tab:

Section Header

1. Navigate to **Maintenance > Logos Suite > Security > User-Defined Fields**. The User-Defined Field List page will open.
2. Select ***Employee Employment*** 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 on the **Employment** tab in *Workforce Administration*.
4. Click **New**. The User-Defined Fields Section Header popup will open.
5. For *Section Header*, type ***MI ORS***.
6. Use the *Sequence Number* field to tell where you want the section to appear in relation to other sections on the **Employment** tab; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the **MI ORS** 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 **MI ORS** section header.



Repeat these steps to create an **MI ORS** section header on the **Jobs** tab, substituting ***Employee Job*** for ***Employee Employment*** in step 2.

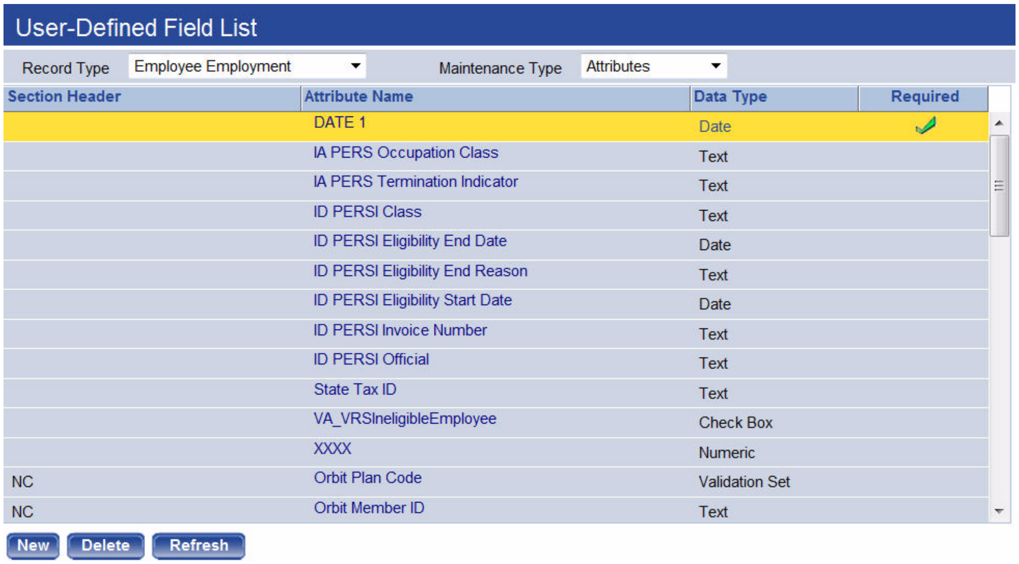
User-Defined Fields

To set up the user-defined fields that will be part of the **MI ORS** section on 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 Employment*** 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 on the **Employment** tab in *Workforce Administration*:



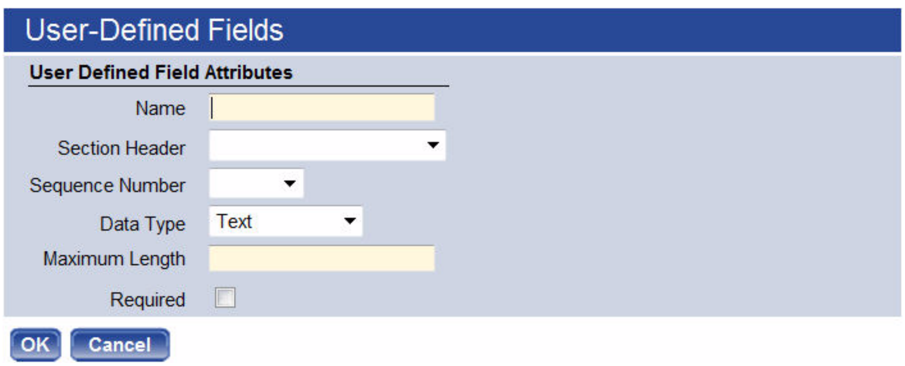
User-Defined Field List

Record Type: Employee Employment | Maintenance Type: Attributes

Section Header	Attribute Name	Data Type	Required
	DATE 1	Date	✓
	IA PERS Occupation Class	Text	
	IA PERS Termination Indicator	Text	
	ID PERSI Class	Text	
	ID PERSI Eligibility End Date	Date	
	ID PERSI Eligibility End Reason	Text	
	ID PERSI Eligibility Start Date	Date	
	ID PERSI Invoice Number	Text	
	ID PERSI Official	Text	
	State Tax ID	Text	
	VA_VRSIneligibleEmployee	Check Box	
	XXXX	Numeric	
NC	Orbit Plan Code	Validation Set	
NC	Orbit Member ID	Text	

New | Delete | Refresh

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



User-Defined Fields

User Defined Field Attributes

Name

Section Header

Sequence Number

Data Type: Text

Maximum Length

Required

OK | Cancel

5 Complete the fields *exactly* as follows:

Field	Value
Name	***TDP Agreement Number***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***9***
Required	(leave unchecked)

6 Click **OK**. The *TDP Agreement Number* field will be added to the *Employee Employment Attributes* grid on the User-Defined Field List page.

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

Field	**Value**
Name	***TDP Invoice Number***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	*8*
Required	(leave unchecked)

Field	**Value**
Name	***TDP Signature Date***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	*8*
Required	(leave unchecked)

Field	**Value**
Name	***TDP Billing Amount***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***

Field	Value
Maximum Length	***8***
Required	(leave unchecked)

Field	Value
Name	***TDP Service Credit Available***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***5***
Required	(leave unchecked)

Field	Value
Name	***TDP Service Credit Purchased***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***5***
Required	(leave unchecked)

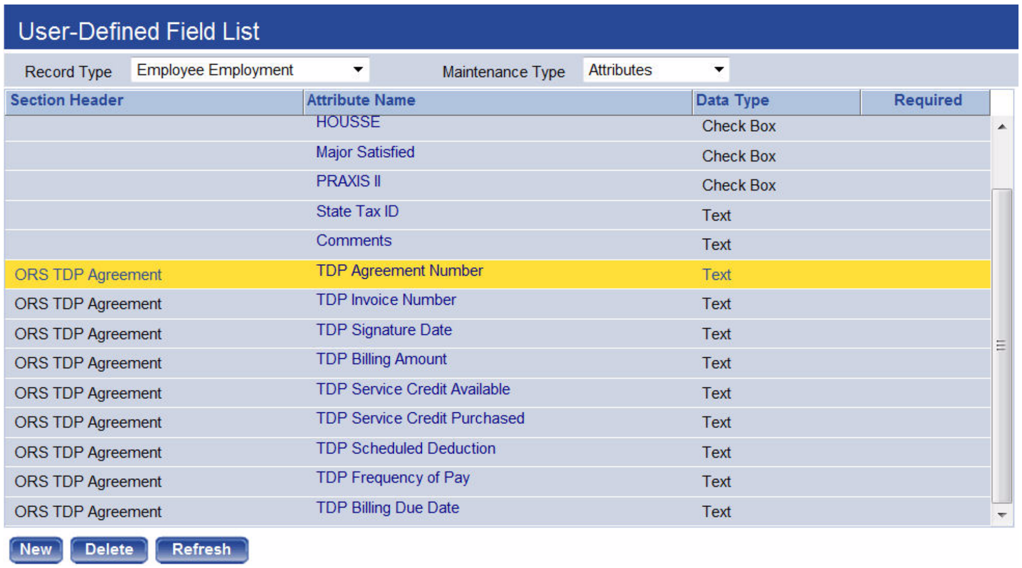
Field	Value
Name	***TDP Scheduled Deduction***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***

Field	Value
Maximum Length	***8***
Required	(leave unchecked)

Field	Value
Name	***TDP Frequency of Pay***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***2***
Required	(leave unchecked)

Field	Value
Name	***TDP Billing Due Date***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***8***
Required	(leave unchecked)

When you are finished, the *Employee Employment 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 **MI ORS** section:



7 To set up the user-defined field that will be part of the **MI ORS** section on the **Jobs** tab in *Workforce Administration*, repeat steps two through five, substituting ***Employee Job*** for ***Employee Employment*** in step 2, and in step 5, complete the fields ***exactly*** as follows:

Field	**Value**
Name	***ORS Class Code***
Section Header	***MI ORS***
Sequence Number	(your choice or blank)
Data Type	***Text***
Maximum Length	***4***
Required	✓

When you are finished, the *Employee Job Attributes* grid on the User-Defined Field List page should contain a row for the user-defined field you have saved as part of the **MI ORS** section.

Employee Setup for Michigan ORS Reporting

To set up an employee for Michigan ORS reporting, follow these steps:

1. Navigate to **Human Resources > Workforce Administration > Search**. The Employee Search page will open.
2. Use the search controls to produce a list of employees.
3. Click the *Employee Number* link for the employee you want to set up for ORS reporting. The employee's Workforce Administration page will open.
4. Click the **Employment** or **Jobs** tab to bring it forward. The tab will contain the **MI ORS** section and numeric field(s) you set up.
5. Make valid selections in the appropriate user-defined fields.

   The table below shows how each TDP user-defined field on the **Employment** tab needs to be formatted:

Field	Agreement Form Box Number (Example)	Format
TDP Agreement Number	3 (first number)	***012345678***
TDP Invoice Number	3 (second number)	***12345678***
TDP Signature Date	Next to your school official's signature (no dashes)	***07312011***
TDP Billing Amount	7 (no $ or decimal points 1000.00)	***00100000***
TDP Service Credit Available	8 (goes out 3 decimal places 5.000 years)	***05000***
TDP Service Credit Purchased	10 (goes out 3 decimal places 5.000 years)	***05000***
TDP Scheduled Deduction	11 (no $ or decimal points 50.00)	***00005000***
TDP Frequency of Pay	13 (bi-weekly)	***26***
TDP Billing Due Date	15 (no dashes)	***09302011***

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

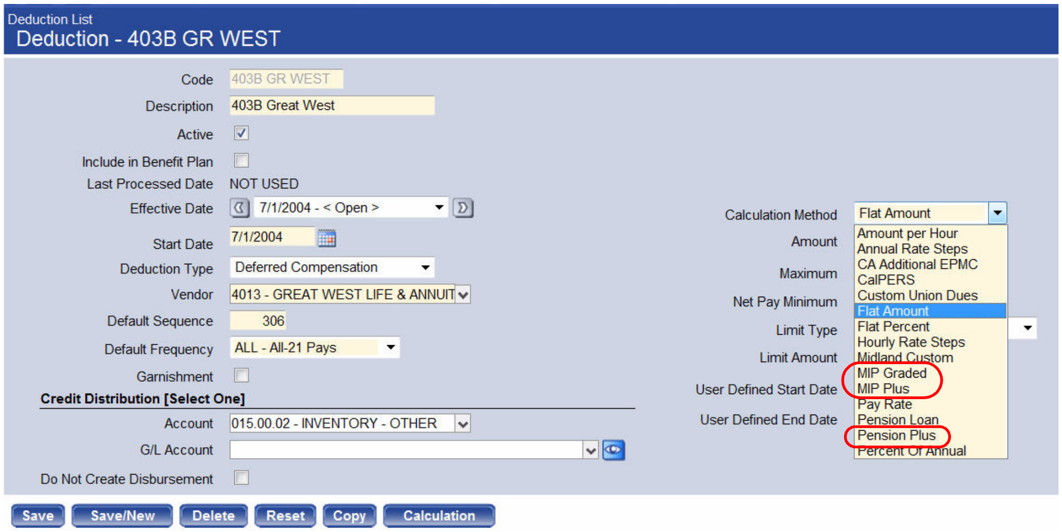
MIP and Pension Plus Deduction Setup

The *Calculation Method* drop-down on the Deduction page contains three options for MIP and Pension Plus plans: ***MIP Graded***, ***MIP Plus*** and ***Pension Plus***. Each method will apply the corresponding contribution percent to gross wages that fall within the ranges shown in the table below:

MIP Graded	Percent
$0.00 - $5,000.00 (When gross wages fall within this range, the corresponding percent will be applied.)	3.0%
$5,001.00 - $15,000.00	3.6%
More than $15,000	4.3%
MIP Plus	
$0.00 - $5,000.00	3.0%
$5,001.00 - $15,000.00	3.6%
More than $15,000	6.4%
Pension Plus (New employees first worked 7/1/2010 or later)	
$0.00 - $5,000.00	3.0%
$5,001.00 - $15,000.00	3.6%
More than $15,000	6.4%

To set up a deduction to use an MIP or Pension Plus calculation method, follow these steps:

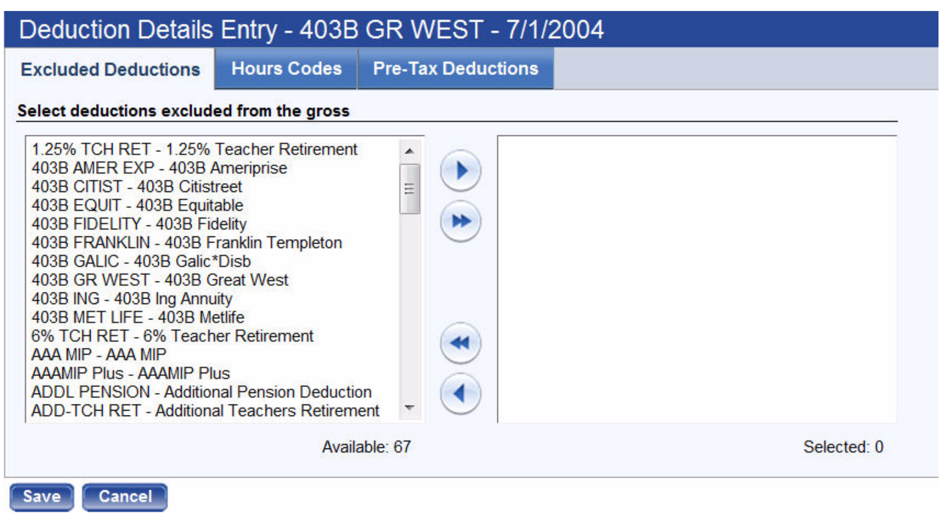
1. Navigate to **Maintenance > Human Resources > Deductions and Benefits > Deductions**. The Deduction List page will open.
2. Click a deduction *Code* to open the Deduction page:



3 Click in the *Calculation Method* field to open the drop-down of calculation methods.

4 Click the calculation method you want. It will populate the *Calculation Method* field.

5 Click the **Calculation** button, located at the bottom of the page. The Deduction Details Entry popup will open:



6 In the *Available* list box on the **Excluded Deductions** tab, select the deductions that are to be excluded from the gross, and move them to the *Selected* box.

7 In the *Available* list box on the **Hours Codes** tab, select the hours codes that are to be excluded in the gross, and move them to the *Selected* box.

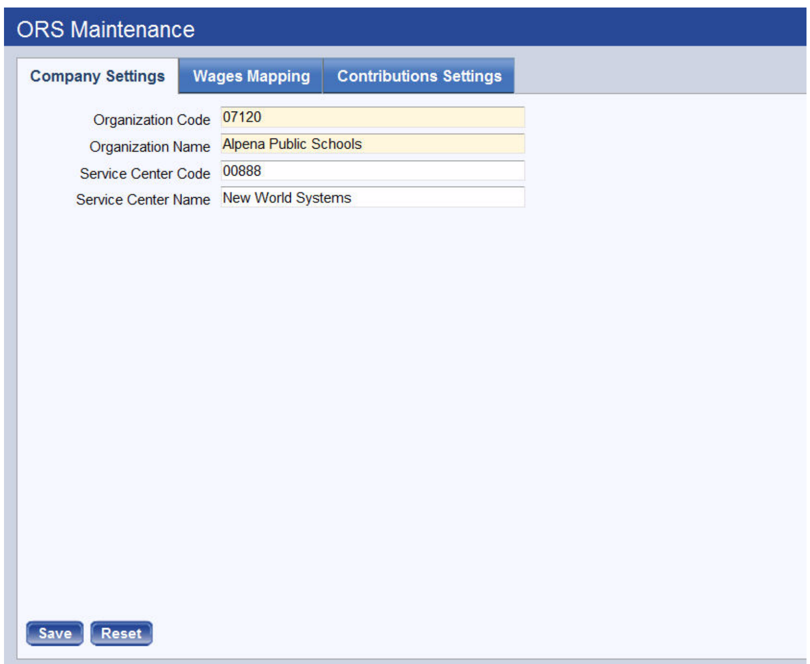
8 In the *Available* list box on the **Pre-Tax Deductions** tab, select the taxes that are to be reduced by the deduction, and move them to the *Selected* box.

9 Click **Save**.

Michigan ORS Maintenance

The following steps show you how to set up and maintain the reporting values used consistently in creating your retirement data. Setup includes company information, wage mappings and contribution settings.

1 Navigate to **Human Resources > State Requirements > MI > ORS Maintenance**. The ORS Maintenance page will open, with the **Company Settings** tab brought forward, as shown below:



2 Type the five-digit *Organization Code*. The first four digits are the number assigned to the individual reporting unit. These digits should be followed by a zero (0).

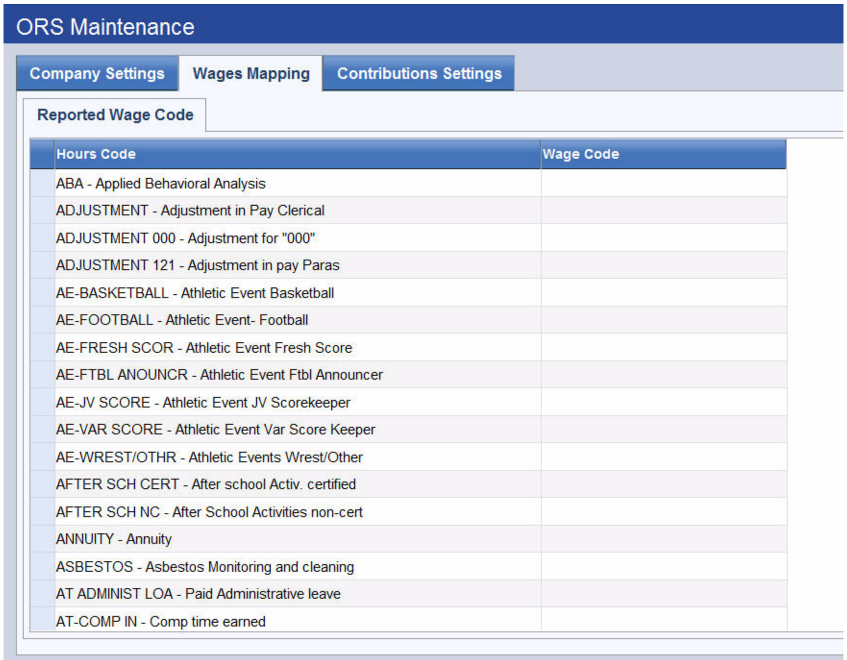
3 In the *Organization Name* field, type the name of the reporting unit.

4 In the *Service Center Code* field, if applicable, type the five-digit code of the service center that prepared the file.

5 In the *Service Center Name* field, if applicable, type the name of the service center that prepared the file.

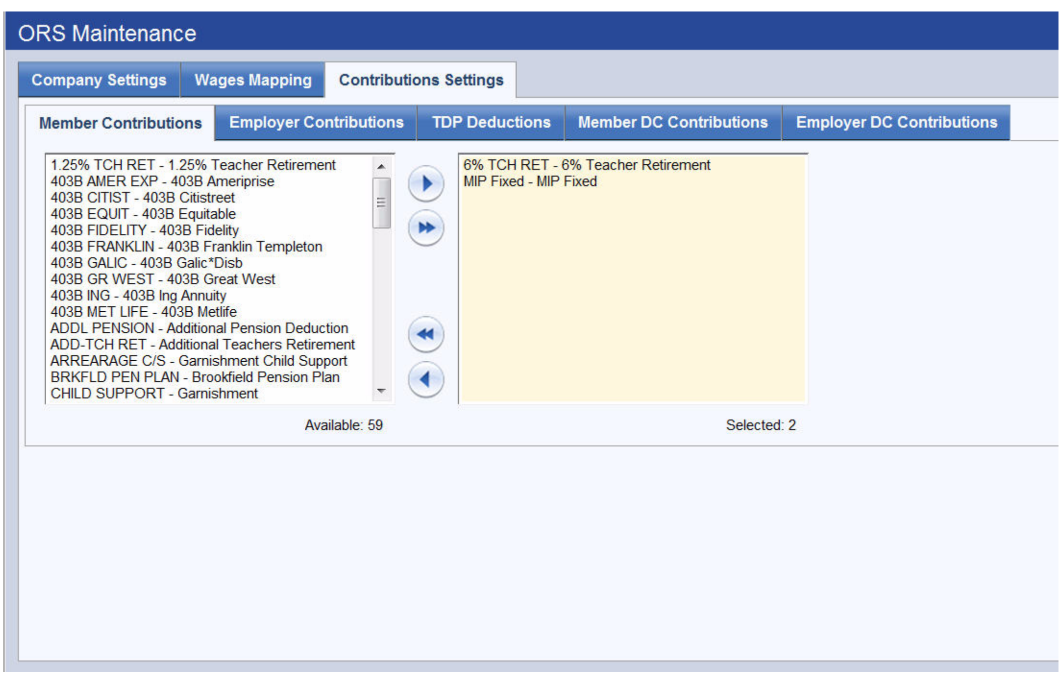
6 Click **Save**.

7 Click the **Wages Mapping** tab to bring it forward:



8 Typing directly in the *Wage Code* cells, map the ORS wage codes to the hours codes that pertain to the reported wage codes for retirement system members.

9 Click the **Contributions Settings** tab to bring it forward:



10 The **Contributions Settings** tab contains five tabs of list boxes. Use the list boxes on these tabs to select the deduction and benefit codes that sum up what the retirement system members and the employer are contributing to retirement:

The list boxes on the **Member Contributions**, **TDP Deductions** and **Member DC Contributions** tabs contain deduction codes; the list boxes on the **Employer Contributions** and **Employer DC Contributions** tabs contain benefit codes.

NOTE:

TDP Deductions refer to the purchasing of hours of service for retirement; for example, an employee who was enlisted in military service for three years may choose to purchase three years of service through payroll deductions.

11 To store the ORS Maintenance settings, click **Save** on the **Company Settings** tab.

Create Michigan ORS Data

Once you have completed the setup and maintenance steps, you will be ready to create an on-screen work file of the retirement data that will be available for the Michigan ORS 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** > **MI** > **ORS Members List**. The ORS Members List page will open:


ORS Member List

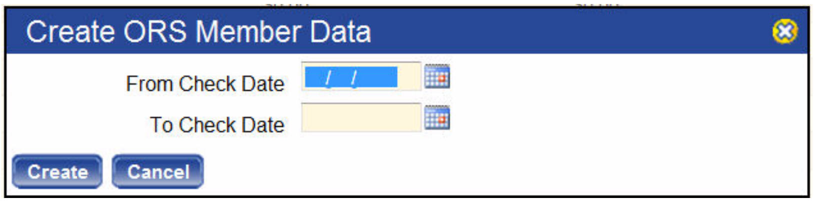
ORS Members

Employee Name	Hours	Wage Code	Wages	Exception Wages	Member DB Contributions	Employer DB Contributions	Class Code
287 - Almeda, Danielle	0.0000	01	$3,501.09	$0.00	$105.03	$721.22	1240
39 - Appenzeller, Shamar M	0.0000		$0.00	$0.00	$0.00	$0.00	
907 - Bailard, Cindy	0.0000	01	$7,652.24	$0.00	$421.32	$2,225.49	1240
1134 - Baranoski, Jefferson	0.0000	01	$2,665.12	$0.00	$103.94	$549.01	1240
604 - Barsch, Gage R	0.0000		$0.00	$0.00	$0.00	$0.00	
242 - Beerle, Matteo L	1.0000	01	$45.51	$0.00	$3.54	$18.76	1240
72 - Bender, Hana	0.0000	01	$4,230.99	$0.00	$143.85	$871.58	1240
92 - Beren, Abby	0.0000	01	$8,333.34	$0.00	$162.50	$0.00	1240
1 - Beresford, Erika R	1.0000	01	$8,389.43	$0.00	$325.00	$1,716.66	1240
108 - Besanson, Orlando A	0.0000		$0.00	$0.00	$0.00	$0.00	
881 - Bistodeau, Justice	0.0000		$0.00	$0.00	$0.00	$0.00	
390 - Blakeway, Gabriel	0.0000	01	$3,966.26	$0.00	$77.34	$408.52	1130
49 - Faucher, Dakota B	0.0000		$0.00	$0.00	$0.00	$0.00	
281 - Kallenberger, Caroline	1.0000	01	$3,076.19	$0.00	$119.97	$633.70	1240
160 - Lichtenfeld, Ayana	1.0000	01	$3,249.50	$0.00	$126.73	$669.40	1240
218 - Martindelcamp, Larry M	1.0000	01	$2,599.46	$0.00	$101.38	$535.49	1240

Create New Delete Print Options 22 Rows

The grid on this page contains retirement data from the last time the work file was created, with each row in the grid corresponding to an employee record. If you are running this process for the first time, the grid will be empty.

2 Click the **Create** button. The Create ORS Member Data popup will open:



3 Select the check date range for which report data will be created.

4 After selecting the dates, click **Create**. (If data already exists, a popup will let you know. To continue, click **Accept**.) The current retirement data will populate the work file, and the grid on the ORS Members List page will refresh to show all employee retirement system members.

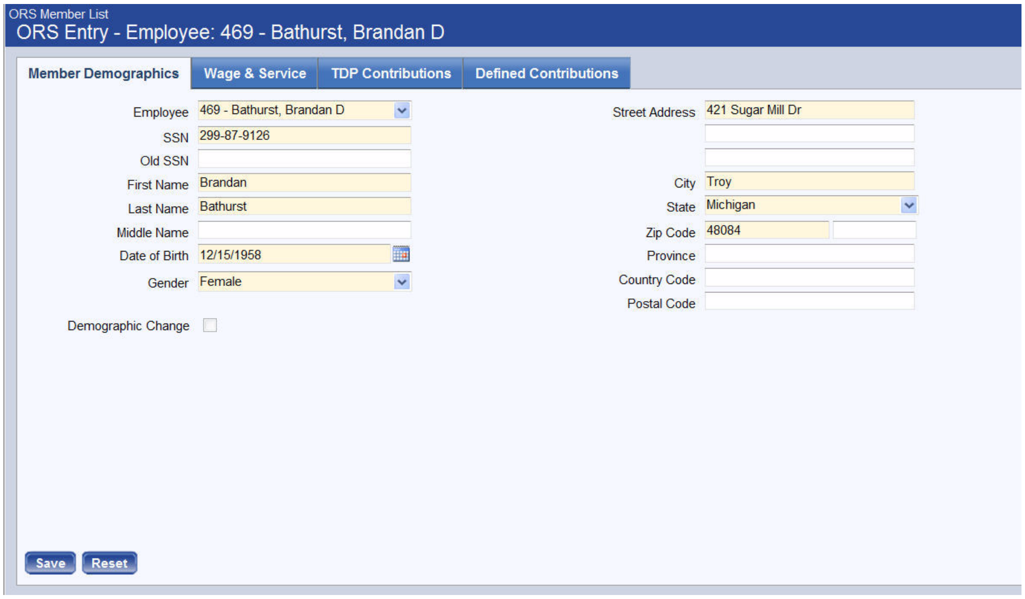
Each row of the grid will correspond to an employee record within a system. Use this grid to review and modify retirement data for each employee within the organization.

To delete a row from the grid, select the row, and click the **Delete** icon, located in the bottom border of the grid.

Add or Edit Michigan ORS Data

To add or edit Michigan ORS data, follow these steps:

1 If you need to add an employee to the grid on the ORS Members List page, click the **New** button located in the bottom border of the grid; if you need to edit data for a particular employee, click the hyperlinked *Employee Name*. In either case, the ORS Entry page will open, containing four tabs of data: **Member Demographics**, **Wages & Services**, **TDP Contributions** and **Defined Contributions**. The **Member Demographics** tab will be brought forward by default:



2 Make entries in the appropriate fields. The following table contains descriptions of the fields and grid cells on each tab:

NOTE:

*The **Member Demographics** tab appears by itself when you are adding an employee to the ORS Member List. Once you save the data, the other three tabs--**Wages & Services**, **TDP Contributions** and **Defined Contributions**--will appear.*

Field	Description
Member Demographics Tab	
Employee	Required. ID of the employee whose wages are being reported to the ORS. When the page is in add mode, selecting the employee automatically populates the fields that already contain entries for the employee in Workforce Administration.
SSN	Required. Social security number of the employee whose wages are being reported.
Old SSN	Available in case the employee has a previous social security number.
First Name	First name, last name and middle initial of the employee. Last and first name are required and should be the same as they are on the employee's membership card.
Last Name	
Middle Name	
Date of Birth	Required. Employee's birth date.

Field	Description
Gender	Required. Employee's gender. Valid entries are ***F*** (Female) and ***M*** (Male).
Demographics Change	To signal that an employee's demographics data has changed since the last time an ORS work file was created, this box will be checked automatically.
Street Address	Required. Complete address of the employee. Each *Street Address* line may contain 30 characters, the *City* 20.
City	
State	
Zip Code	
Province	Province in which the employee lives. Use this field if the country code is not ***USA***.
Country Code	If available, the code identifying the country in which the employee lives. Possible values are available in "Appendix B.6 Country Codes" of the *ORS Reporting Instruction Manual*.
Postal Code	Identifies the employee's postal code. Use this field if the country code is not ***USA***.
Wages & Services Tab	
Begin Date	First and last days employee was paid in the reporting period being submitted (normally same days as begin and end dates of reporting period). If the employee has multiple records within a pay period, these dates will be the first and last days the employee was paid with a unique status code or ORS class code.
End Date	
Retirement Hours	All regular, overtime, sick leave and annual leave hours for which the employee received pay, salary or compensation during the earning period being reported.
Wage Code	Transaction code for the employee record. Possible values are available in "Appendix B-Codes' of the *ORS Reporting Instruction Manual*.
Reported Wages	In general, the salaries or wages earned by an employee for personal services during a calendar month, payroll period or fiscal year.

Field	Description
Exception Wages	9001-Wages an employee receives from the reporting unit while on professional services leave. The reporting unit must be reimbursed for retirement costs. 9002-Wages an employee receives from the member organization while on professional services leave. The reporting unit must be reimbursed for retirement costs.
Employee Contributions	Pre-taxed contributions withheld from the employee's reportable wages.
Employer Contributions	Contributions the employer pays to ORS on behalf of the employee. The amount is a percentage of the reportable wages a member is paid.
Pay Rate	Required to be reported each pay period based on the employee's classification: hourly or contract/salaried.
Class Code	Position the employee holds. All values are listed in "Appendix B.1-Employment Class Codes and Definitions" of the *ORS Reporting Instruction Manual*.
Contract Begin Date *Contract End Date*	First and last days of the contract the employee is working, only used for contract or salaried employees. The fiscal year begin and end dates may be used for noncontractual salaried employees.
Frequency of Pay	Whether hourly or salaried, the total number of pays (21 or 26) the employee would be paid as if working the entire year.
TDP Contributions Tab	
Record Type	Indicates whether the record is a TDP payment or a TDP adjustment. Possible values are listed in "Appendix B.5-TDP Adjustment Type Codes" of the *ORS Reporting Instruction Manual*.
Deduction Amount	Amount deducted from the employee's pay for TDP.
Agreement Number	Number of the employee's TDP agreement.
Invoice Number	Number of the employee's service purchase billing statement.

Field	Description
Deduction Reason Code	Reason a TDP deduction is or is not withheld. Possible values are listed in "Appendix B.4-TDP Deduction Reason Codes" of the *ORS Reporting Instruction Manual*.
Reporting Period End Date	Pay date for which the TDP deduction is made.
Defined Contributions Tab	
Begin Date	First and last days of the reporting period, or first and last days the employee was paid in the reporting period being submitted.
End Date	
DC Record Type	Record type of the Detail 4 record being reported. Possible values are listed in "Appendix B.2.1-DC Record Types" of the *ORS Reporting Instruction Manual*.
Gross Wages	Employee's gross wages.
Member Contributions	Dollar amount of the employee's DC contributions
Member Percent	Percent of the employee's wages allocated as DC contributions.
Employer Contributions	Dollar amount of the employer's DC contributions.
Employer Match Percent	Percentage of the employer's matching dollars allocated to the employee's DC contributions.
Status Change Date	Must be populated if the employee's status has changed.
Status Change Reason Code	Transaction code for status change must be populated if the employee's status has changed. Possible values are listed in "Appendix B-Codes" of the *ORS Reporting Instruction Manual*.

3 After making your entries, click **Save** to update the grid on the ORS Members List page.

Generate Michigan ORS Report

To generate the Michigan ORS Report and transmittal file containing the latest retirement data, click the **Print** button, located in the bottom border of the grid on the ORS Members List page.

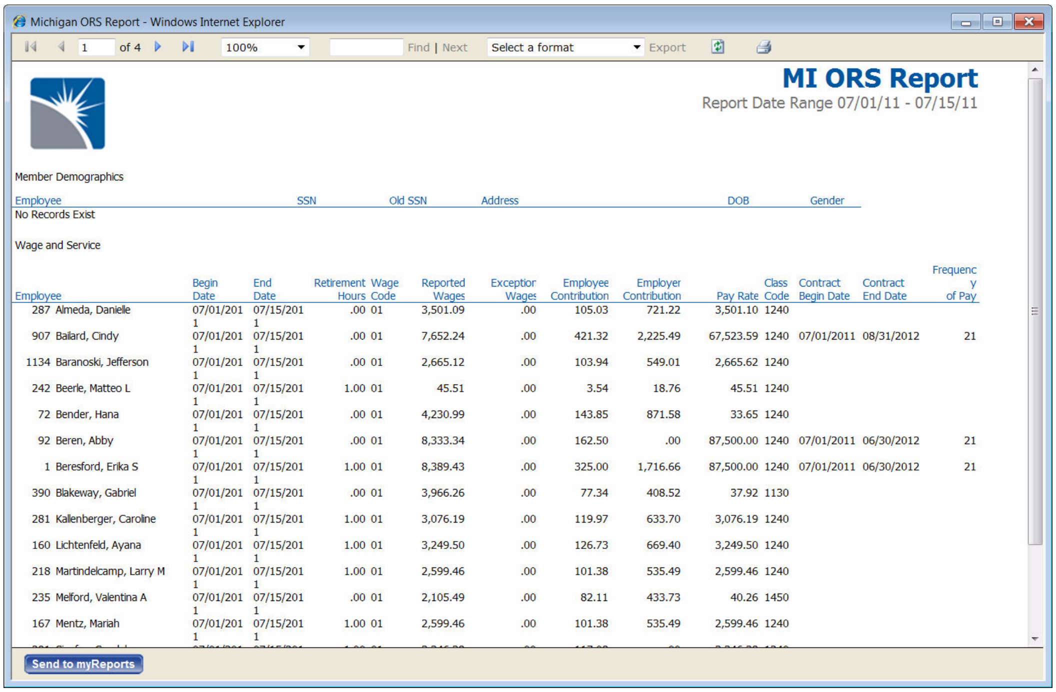
After it generates, the Michigan ORS Report will display the data in an easy-to-read format, giving you the options to export the data to other formats or submit the report to *myReports*.

The report will include individual pages for member demographics, TDP contributions, defined contributions and grand totals.

A transmittal file of the data also will be submitted automatically to *myReports*.

Sample Michigan ORS Report

Member Demographics page


Michigan ORS Report - Windows Internet Explorer

1 of 4 100% Find | Next Select a format Export

MI ORS Report

Report Date Range 07/01/11 - 07/15/11

Member Demographics

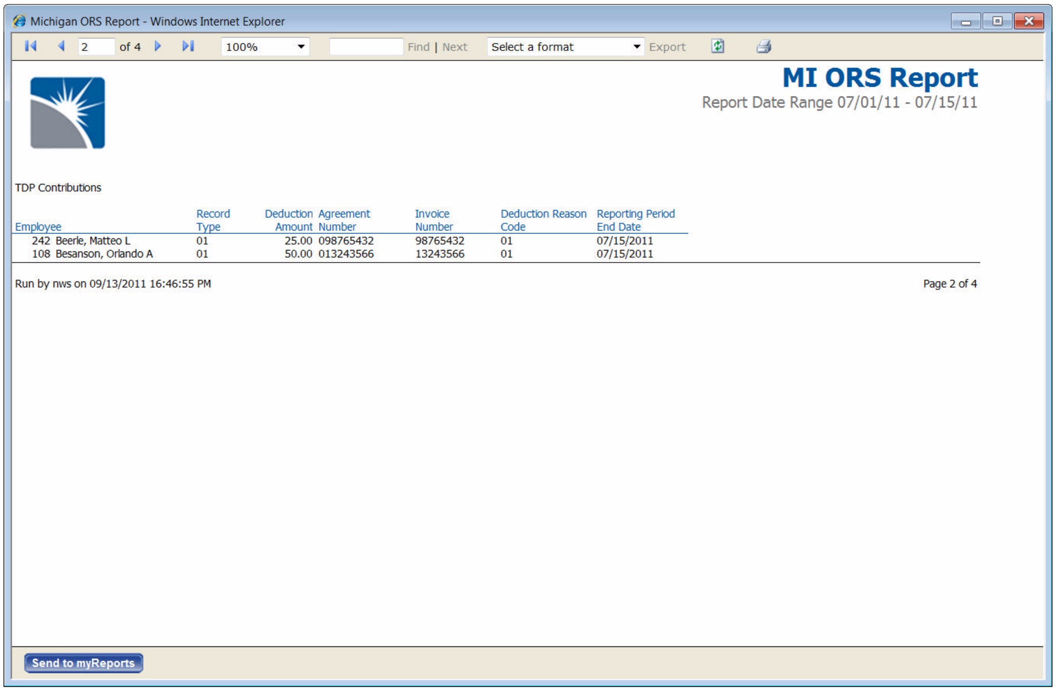
Employee	SSN	Old SSN	Address	DOB	Gender
No Records Exist					

Wage and Service

Employee	Begin Date	End Date	Retirement Hours	Wage Code	Reported Wages	Exception Wages	Employee Contribution	Employer Contribution	Pay Rate	Class Code	Contract Begin Date	Contract End Date	Frequency of Pay
287 Almeda, Danielle	07/01/2011	07/15/2011	.00	01	3,501.09	.00	105.03	721.22	3,501.10	1240			
907 Bailard, Cindy	07/01/2011	07/15/2011	.00	01	7,652.24	.00	421.32	2,225.49	67,523.59	1240	07/01/2011	08/31/2012	21
1134 Baranoski, Jefferson	07/01/2011	07/15/2011	.00	01	2,665.12	.00	103.94	549.01	2,665.62	1240			
242 Beerle, Matteo L	07/01/2011	07/15/2011	1.00	01	45.51	.00	3.54	18.76	45.51	1240			
72 Bender, Hana	07/01/2011	07/15/2011	.00	01	4,230.99	.00	143.85	871.58	33.65	1240			
92 Beren, Abby	07/01/2011	07/15/2011	.00	01	8,333.34	.00	162.50	.00	87,500.00	1240	07/01/2011	06/30/2012	21
1 Beresford, Erika S	07/01/2011	07/15/2011	1.00	01	8,389.43	.00	325.00	1,716.66	87,500.00	1240	07/01/2011	06/30/2012	21
390 Blakeway, Gabriel	07/01/2011	07/15/2011	.00	01	3,966.26	.00	77.34	408.52	37.92	1130			
281 Kallenberger, Caroline	07/01/2011	07/15/2011	1.00	01	3,076.19	.00	119.97	633.70	3,076.19	1240			
160 Lichtenfeld, Ayana	07/01/2011	07/15/2011	1.00	01	3,249.50	.00	126.73	669.40	3,249.50	1240			
218 Martindelcamp, Larry M	07/01/2011	07/15/2011	1.00	01	2,599.46	.00	101.38	535.49	2,599.46	1240			
235 Melford, Valentina A	07/01/2011	07/15/2011	.00	01	2,105.49	.00	82.11	433.73	40.26	1450			
167 Mentz, Mariah	07/01/2011	07/15/2011	1.00	01	2,599.46	.00	101.38	535.49	2,599.46	1240			

Send to myReports

TDP Contributions page



Michigan ORS Report - Windows Internet Explorer

MI ORS Report
Report Date Range 07/01/11 - 07/15/11

TDP Contributions

Employee	Record Type	Deduction Amount	Agreement Number	Invoice Number	Deduction Reason Code	Reporting Period End Date
242 Beerle, Matteo L	01	25.00	098765432	98765432	01	07/15/2011
108 Besanson, Orlando A	01	50.00	013243566	13243566	01	07/15/2011

Run by nws on 09/13/2011 16:46:55 PM — Page 2 of 4

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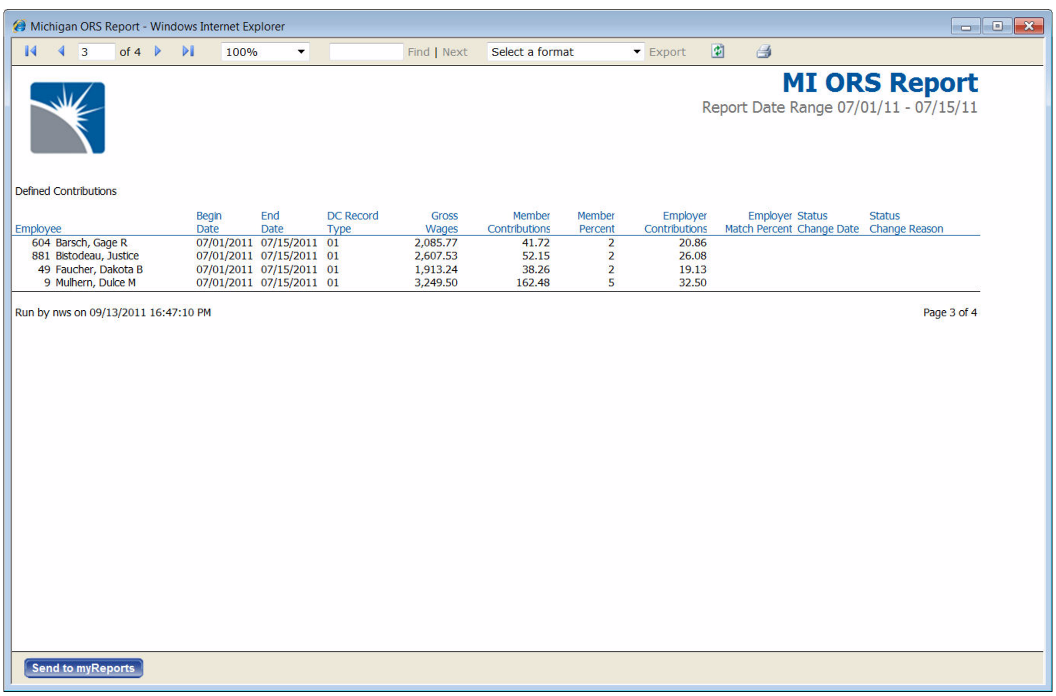
Defined Contributions page



Michigan ORS Report - Windows Internet Explorer

MI ORS Report
Report Date Range 07/01/11 - 07/15/11

Defined Contributions

Employee	Begin Date	End Date	DC Record Type	Gross Wages	Member Contributions	Member Percent	Employer Contributions	Employer Match Percent	Status Change Date	Status Change Reason
604 Barsch, Gage R	07/01/2011	07/15/2011	01	2,085.77	41.72	2	20.86			
881 Bistodeau, Justice	07/01/2011	07/15/2011	01	2,607.53	52.15	2	26.08			
49 Faucher, Dakota B	07/01/2011	07/15/2011	01	1,913.24	38.26	2	19.13			
9 Mulhern, Dulce M	07/01/2011	07/15/2011	01	3,249.50	162.48	5	32.50			

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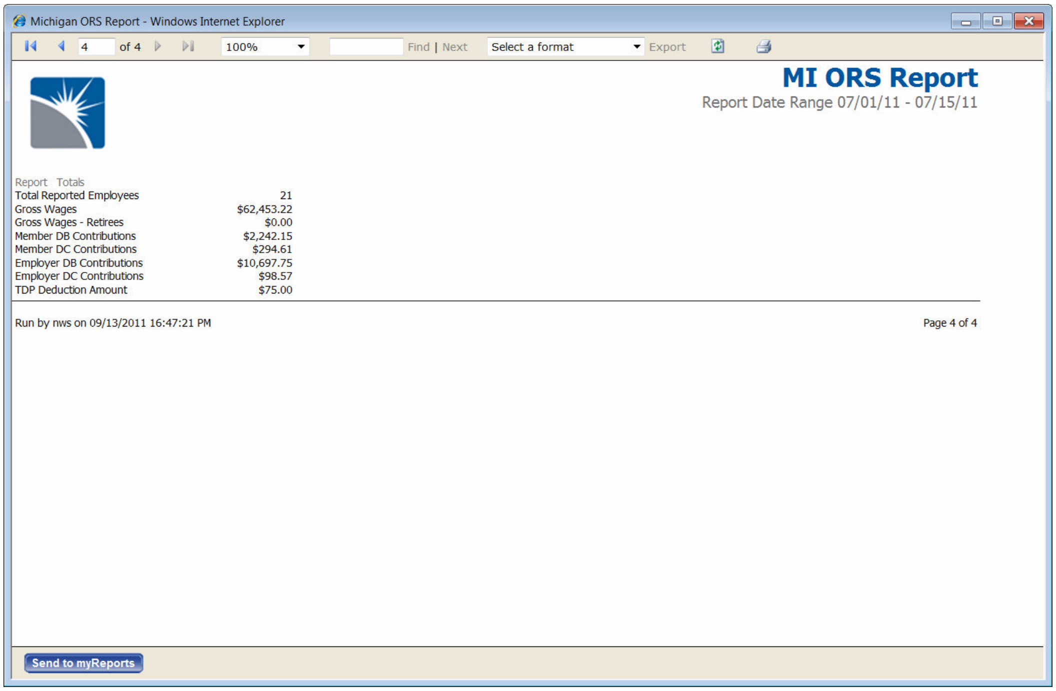
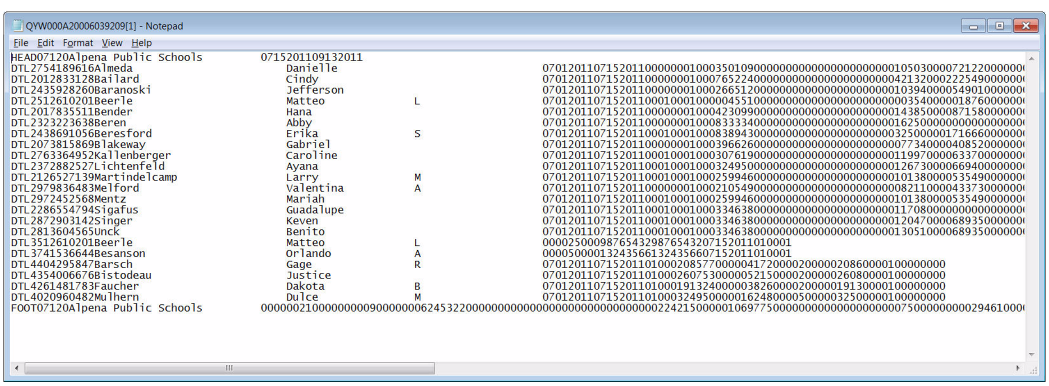
Send to myReports

Report Totals page



To view the transmittal file, click the *MI ORS Transmittal File* in *myReports*. A File Download popup will display on the right side of the page. You may open the file to view it now or save it in another location to view it later.

Sample Michigan ORS Transmittal File




```
HEAD07120Alpena Public Schools        0715201109132011
DTL2754189616Almeda                       Danielle                 070120110715201100000001000350109000000000000000000000001050300007212200000
DTL2012833128Bailard                      Cindy                    070120110715201100000001000765224000000000000000000000000421320002225490000
DTL2435928260Baranoski                    Jefferson                070120110715201100000001000266512000000000000000000000001039400005490100000
DTL2512610201Beerle                       Matteo            L      070120110715201100010001000004551000000000000000000000000354000001876000000
DTL2017835511Bender                       Hana                     070120110715201100000001000423099000000000000000000000001438500008715800000
DTL2323223638Beren                        Abby                     070120110715201100000001000833334000000000000000000000001625000000000000000
DTL2438691056Beresford                    Erika             S      070120110715201100010001000838943000000000000000000000000325000001716660000
DTL2073815869Blakeway                     Gabriel                  070120110715201100000001000396626000000000000000000000000773400004085200000
DTL2763364952Kallenberger                 Caroline                 070120110715201100010001000307619000000000000000000000001199700006337000000
DTL2372882527Lichtenfeld                  Ayana                    070120110715201100010001000324950000000000000000000000001267300006694000000
DTL2126527139Martindelcamp                Larry             M      070120110715201100010001000259946000000000000000000000001013800005354900000
DTL2979836483Melford                      Valentina         A      070120110715201100000001000210549000000000000000000000000821100004337300000
DTL2972452568Mentz                        Mariah                   070120110715201100010001000259946000000000000000000000001013800005354900000
DTL2286554794Sigafus                      Guadalupe                070120110715201100010001000334638000000000000000000000001170800000000000000
DTL2872903142Singer                       Keven                    070120110715201100010001000334638000000000000000000000001204700006893500000
DTL2813604565Unck                         Benito                   070120110715201100010001000334638000000000000000000000001305100006893500000
DTL3512610201Beerle                       Matteo            L      000025000987654329876543207152011010001
DTL3741536644Besanson                     Orlando           A      000050000132435661324356607152011010001
DTL4404295847Barsch                       Gage              R      070120110715201101000208577000004172000020000020860000100000000
DTL4354006676Bistodeau                    Justice                  070120110715201101000260753000005215000020000026080000100000000
DTL4261481783Faucher                      Dakota            B      070120110715201101000191324000003826000020000019130000100000000
DTL4020960482Mulhern                      Dulce             M      070120110715201101000324950000016248000050000032500000100000000
FOOT07120Alpena Public Schools        00000021000000000900000006245322000000000000000000000000000000000000022421500000106977500000000000000000000007500000000029461000
```

TDP Agreement Report

The State Requirements menu for Michigan contains an option that lets you upload to the ORS a transmittal file containing the data associated with the tax-deferred payment (TDP) agreement between your employees and the state.

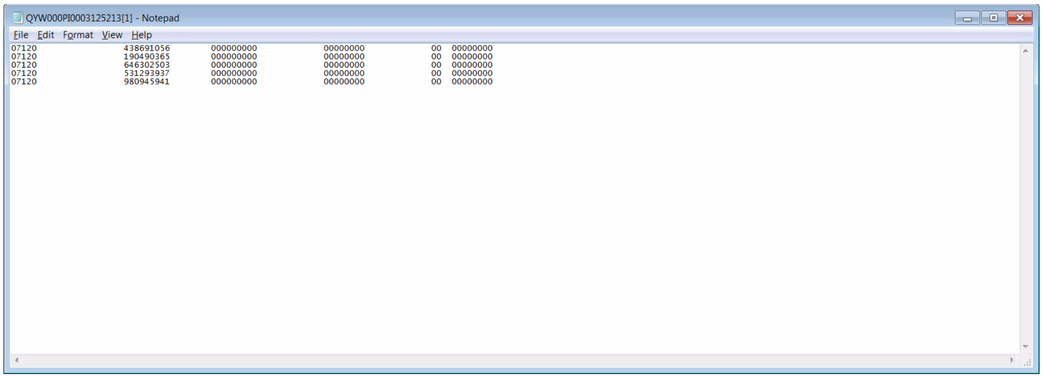
To use this option, navigate to **Human Resources > State Requirements > MI > TDP Agreement Filing**. The TDP Agreement Report page will open:

The TDP is a voluntary program that lets employees purchase additional retirement hours that will apply toward their total hours banks. Employers are responsible for sending the contract information via transmittal upload to the ORS before they begin taking the TDP deductions from their employees.

To generate the transmittal file and submit it to *myReports*, follow these steps:

1. Select an employee name in the *Employee* field.
2. Click the **Add** button to add the name to the *Employee Selected* box.
3. Repeat steps 1 and 2 for each employee who is to be included in the transmittal file.
4. Click **Submit**.

Sample TDP Agreement Transmittal File




```
07120                 438691056    000000000         00000000        00  00000000
07120                 190490365    000000000         00000000        00  00000000
07120                 646302503    000000000         00000000        00  00000000
07120                 531293937    000000000         00000000        00  00000000
07120                 980945941    000000000         00000000        00  00000000
```

Michigan REP Report

Human Resources > State Requirements > MI > REP Report

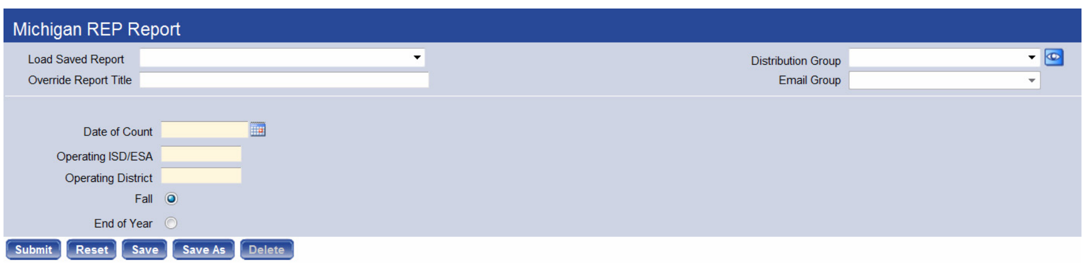
Use the *REP Report* option to create a report and transmittal file of the Registry of Educational Personnel (REP) credentials and assignments data marked as *Use for REP* (credentials) or *REP Reportable* (assignments) on the **Employment** tab of the Workforce Administration.

NOTE:

The Michigan REP Report option is available on the Michigan State Requirements menu only if you are licensed to K-12.

NOTE:

*A security component, **Michigan REP Report**, exists for this option. Navigate to Maintenance > Logos Suite > Security > Users, 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.*



The transmittal file is submitted to the Michigan Education Information System (MEIS) twice per year, once in the fall (first business day in December) and once at the end of the school year (June 30).

NOTE:

Make sure to check the Center for Educational Performance and Information (CEPI) PDF at michigan.gov for the latest changes in reporting requirements.

The report will display in SSRS format, allowing you to save it in a different format, such as PDF, in *myReports*. The transmittal file will be sent to *myReports* as a text file.

Report Setup

The Michigan REP Report requires the setup of three user-defined fields (UDFs) in *Workforce Administration*, one that will appear in the Demographics section of the **Personal** tab, and two that will appear in the Employment section of the **Employment** tab.

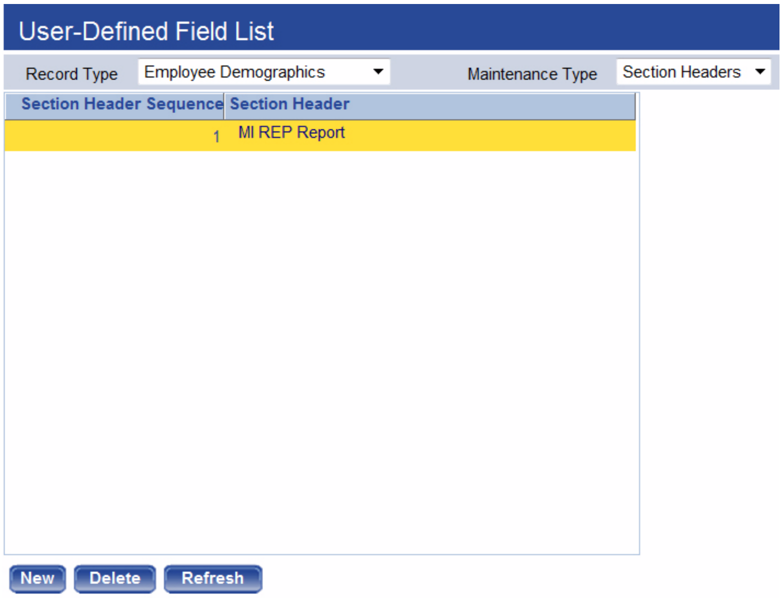
The following steps show you how to set up these fields and a section header for making them easy to locate in the Demographics and Employment sections:

Section Header

1. Navigate to **Maintenance > Logos Suite > Security > User-Defined Fields**. The User-Defined Field List page will open.
2. Select ***Employee Demographics*** 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 the Demographics section of the **Personal** tab in *Workforce Administration*.
4. Click **New**. The User-Defined Fields Section Header popup will open.
5. For *Section Header*, type ***MI REP Report***.
6. Use the *Sequence Number* field to tell where you want the section to appear in relation to other sections in the Demographics section; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the **MI REP 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 **MI REP Report** section header:



Repeat these steps to create an **MI REP Report** section header in the Employment section of the **Employment** tab, substituting ***Employee Employment*** for ***Employee Demographics*** in step 2.

User-Defined Fields

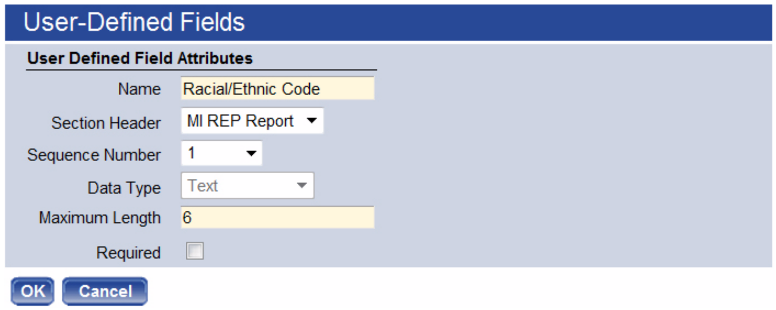
To set up the user-defined field that will appear under the **MI REP Report** header in the Demographics section of the **Personal** tab, follow these steps:

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

2 Select ***Employee Demographics*** 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 the Demographics section.

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



5 As shown in the image above, complete the fields *exactly* as follows:

Field	Value
Name	***Racial/Ethnic Code***
Section Header	***MI REP Report***
Sequence Number	***1***
Data Type	***Text***
Maximum Length	***6***
Required	(leave unchecked)

6 Click **OK**. The *Racial/Ethnic Code* field will be added to the *Employee Demographics Attributes* grid on the User-Defined Field List page.

7 To set up the two user-defined fields that will appear under the **MI REP Report** header in the Employment section of the **Employment** tab, repeat steps two through six, substituting ***Employee Employment*** for ***Employee Demographics*** in step 2, and in step 5, complete the fields ***exactly*** as follows:

Field	Value
Name	***Classroom Management***
Section Header	***MI REP Report***
Sequence Number	***1***
Data Type	***Quantity***

Field	Value
Decimal Places	**2**
Required	(leave unchecked)

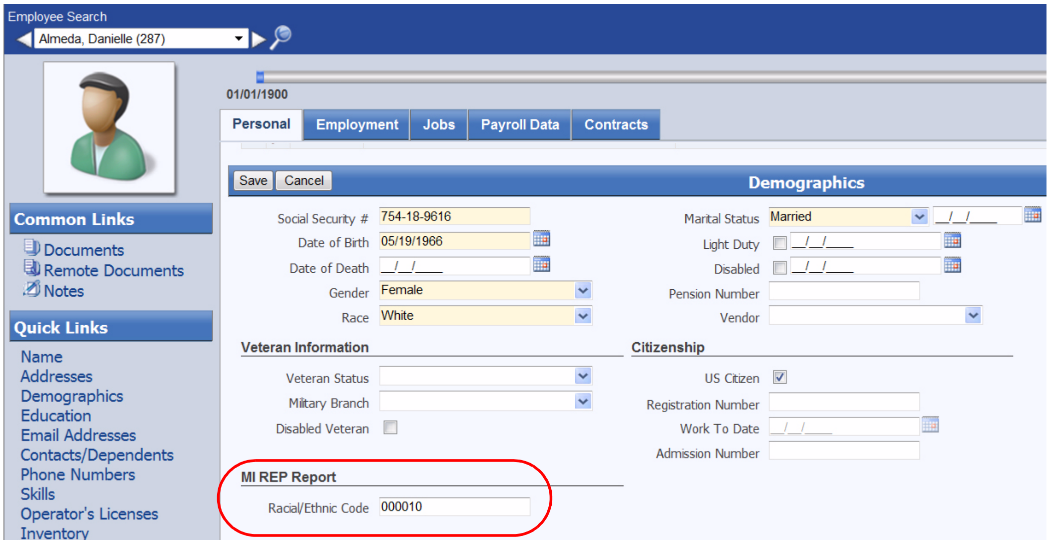
Field	Value
Name	***Instructional Delivery***
Section Header	***MI REP Report***
Sequence Number	**2**
Data Type	***Quantity***
Decimal Places	**2**
Required	(leave unchecked)

These two UDFs are used to report new teacher professional development.

When you are finished, the *Employee Employment 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 **MI REP Report** section.

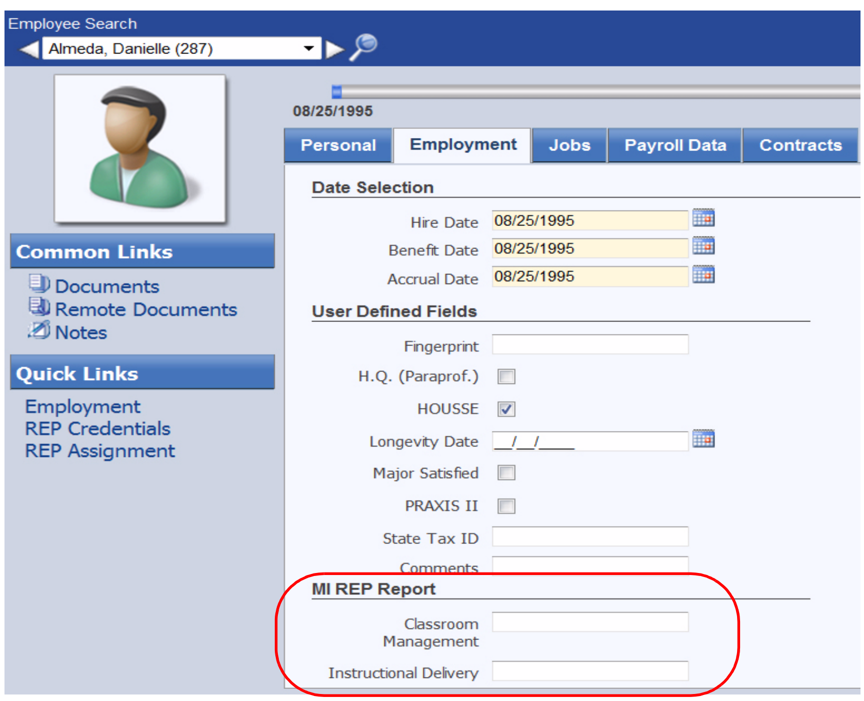
REP Racial/Ethnic Code

The image below shows the user-defined *Racial/Ethnic Code* field in the Demographics section of the **Personal** tab:



REP Professional Development

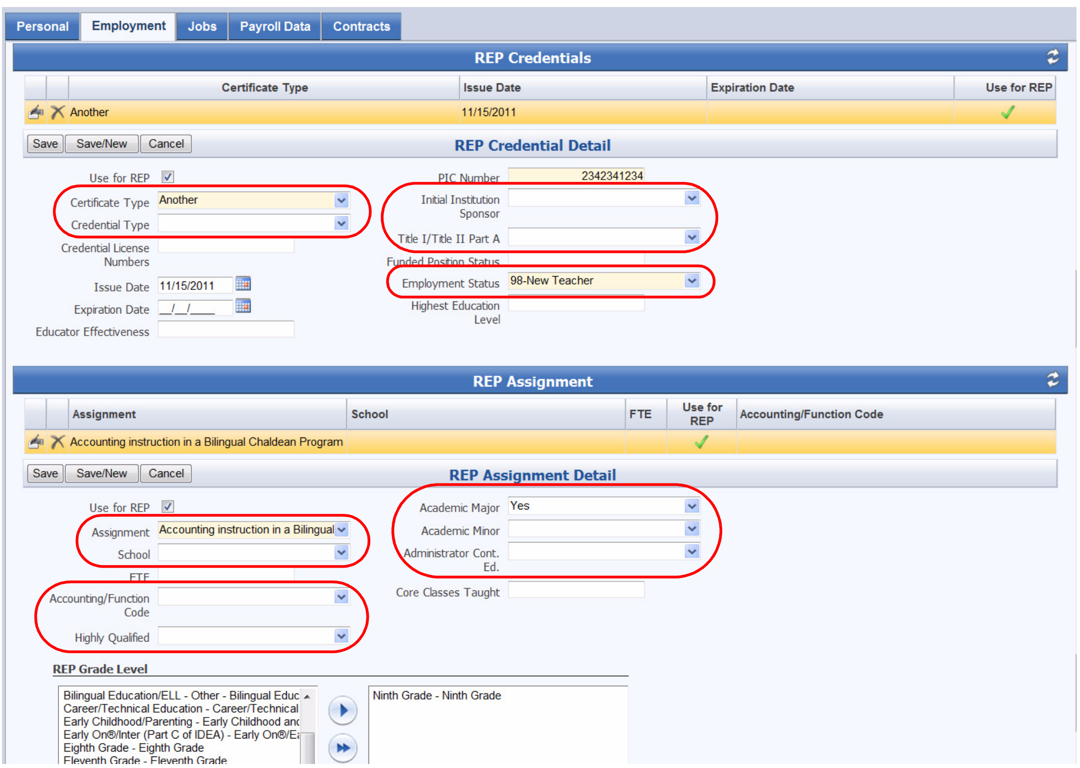
The image below shows the user-defined *Classroom Management* and *Instructional Delivery* fields in the general Employment section of the **Employment** tab:



Michigan REP Validation-Set Values

Most of the fields in the REP Credentials and REP Assignments sections on the Workforce Administration **Employment** tab are validation-set fields (**Maintenance > Logos Suite > System> Validation Sets > Validation Set List**). To comply with the formatting requirements of the state transmittal file, the values in these fields must be expressed precisely; therefore, the validation set for each field must have values set up for use by the Michigan REP Report.

Validation-set fields in the REP Credentials and REP Assignments sections are circled on the image of the Workforce Administration **Employment** tab below. A table containing the names of the fields and their associated validation sets and step-by-step instructions for setting up validation-set values follows:



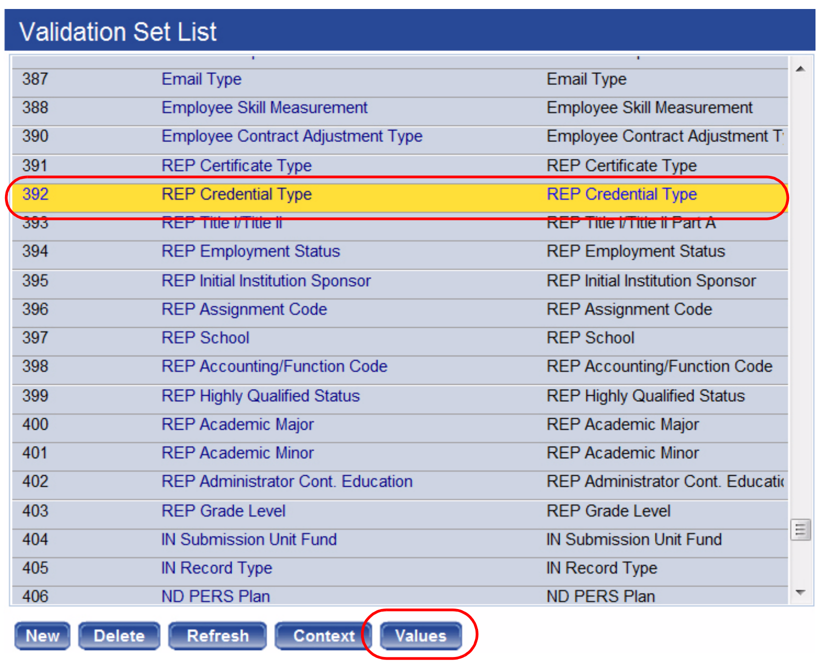
Field	Validation Set
Certificate Type	391-REP Certificate Type
Credential Type	392-REP Credential Type
Title I/Title II Part A	393-REP Title I/Title II Part A
Employment Status	394-REP Employment Status
Initial Institution Sponsor	395-REP Initial Institution Sponsor
Assignment	396-REP Assignment Code

Field	Validation Set
School	397-REP School
Accounting/Function Code	398-REP Accounting/Function Code
Highly Qualified	399-REP Highly Qualified Status
Academic Major	400-REP Academic Major
Academic Minor	401-REP Academic Minor
Administrator Cont. Ed.	402-REP Administrator Cont. Education
REP Grade Level	403-REP Grade Level

The following steps show you how to set up values for validation set *392-Credential Type*:

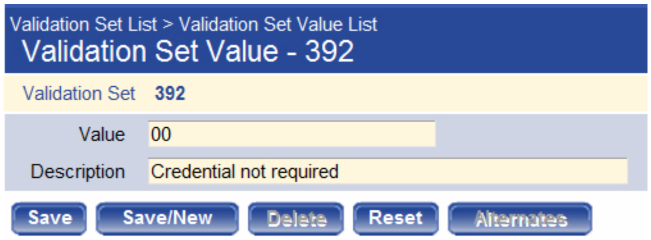
1 Navigate to **Maintenance > Logos Suite > System > Validation Sets > Validation Set List**.

2 Highlight validation set ***392-REP Credential Type***.



3 Click the **Values** button. The Validation Set Values List page for ***REP Certificate Type*** will open.

4 Click **New**. The Validation Set Value page will open:



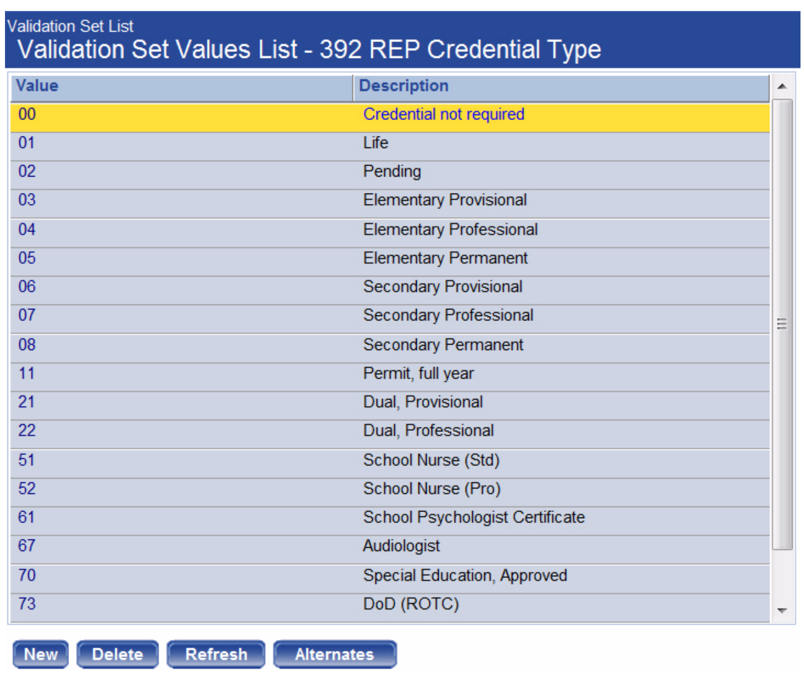
5 In the *Value* field, type ***00***.

6 In the *Description* field, type ***Credential not required***, or any entry that makes it easy for you to identify the *Value*. This entry is not required to comply with a predetermined wording.

7 Click **Save/New**. Your entries will be saved and cleared, and the Validation Set Value page will remain open for the entry of a new value.

Repeat steps 5-7 for the remaining validation-set values that need to be set up, clicking **Save** after making entries for the final value. (Please refer to the “Registry for Educational Personnel” document at **http://www.michigan.gov/documents/cepi/REP_Glossary_278177_7.pdf** for the precise values to be entered.)

The completed Validation Set Values List for 392-Credential Type should look like the image shown below:


Validation Set List

Validation Set Values List - 392 REP Credential Type

Value	Description
00	Credential not required
01	Life
02	Pending
03	Elementary Provisional
04	Elementary Professional
05	Elementary Permanent
06	Secondary Provisional
07	Secondary Professional
08	Secondary Permanent
11	Permit, full year
21	Dual, Provisional
22	Dual, Professional
51	School Nurse (Std)
52	School Nurse (Pro)
61	School Psychologist Certificate
67	Audiologist
70	Special Education, Approved
73	DoD (ROTC)

New Delete Refresh Alternates

Repeat steps 1-7 for each REP validation set (391-403).

Michigan REP Report

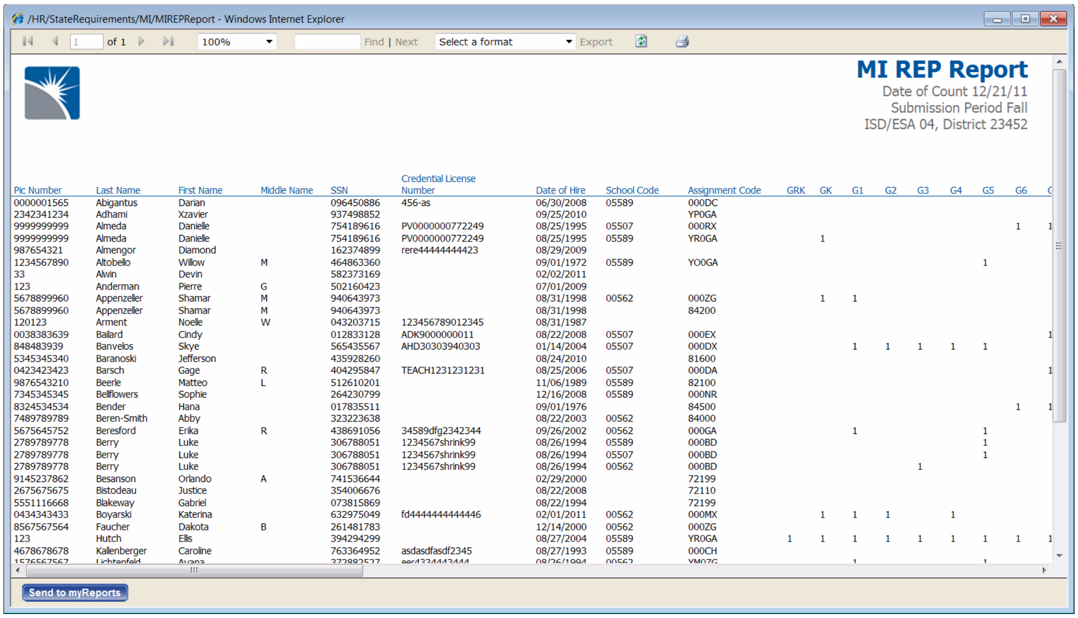
Human Resources > State Requirements > MI > REP Report

The following table contains descriptions of the fields on the Michigan REP Report page:

Field	Description
Date of Count	Required. Data obtained for each employee's primary job as of this date.
Operating ISD/ESA	Required. State-assigned, two-digit number of the intermediate school district (ISD) or Educational Service Agency (ESA) that has the operating district or program where the staff member is employed.
Operating District	Required. State-assigned, five-digit local education agency (LEA), public school academy (PSA) or ISD number of the district where the staff member is employed.
Fall/End of Year	Determines whether the report will be submitted for the fall or the end of the year.

After making your selections on the page, click the **Submit** button to generate and display the Michigan REP Report in SSRS format, with options to save the report in another format, such as PDF, and send it to *myReports*. The transmittal file also will be generated and sent to *myReports*.

Sample Michigan REP Report (SSRS Display)


/HR/StateRequirements/MI/MIREPReport - Windows Internet Explorer

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

MI REP Report
Date of Count 12/21/11
Submission Period Fall
ISD/ESA 04, District 23452

Pic Number	Last Name	First Name	Middle Name	SSN	Credential License Number	Date of Hire	School Code	Assignment Code	GRK	GK	G1	G2	G3	G4	G5	G6	G
0000001565	Abigantus	Darian		096450886	456-as	06/30/2008	05589	000DC									
2342341234	Adhami	Xzavier		937498852		09/25/2010		YP0GA									
9999999999	Almeda	Danielle		754189616	PV0000000772249	08/25/1995	05507	000RX								1	1
9999999999	Almeda	Danielle		754189616	PV0000000772249	08/25/1995	05589	YR0GA		1							
987654321	Almengor	Diamond		162374899	rere44444444423	08/29/2009											
1234567890	Altobello	Willow	M	464863360		09/01/1972	05589	YO0GA							1		
33	Alwin	Devin		582373169		02/02/2011											
123	Anderman	Pierre	G	502160423		07/01/2009											
5678899960	Appenzeller	Shamar	M	940643973		08/31/1998	00562	000ZG		1	1						
5678899960	Appenzeller	Shamar	M	940643973		08/31/1998		84200									
120123	Arment	Noelle	W	043203715	123456789012345	08/31/1987											
0038383639	Bailard	Cindy		012833128	ADK9000000011	08/22/2008	05507	000EX									1
848483939	Banvelos	Skye		565435567	AHD30303940303	01/14/2004	05507	000DX			1	1	1	1	1		
5345345340	Baranoski	Jefferson		435928260		08/24/2010		81600									
0423423423	Barsch	Gage	R	404295847	TEACH1231231231	08/25/2006	05507	000DA									1
9876543210	Beerle	Matteo	L	512610201		11/06/1989	05589	82100									
7345345345	Bellflowers	Sophie		264230799		12/16/2008	05589	000NR									
8324534534	Bender	Hana		017835511		09/01/1976		84500								1	1
7489789789	Beren-Smith	Abby		323223638		08/22/2003	00562	84000									
5675645752	Beresford	Erika	R	438691056	34589dfg2342344	09/26/2002	00562	000GA			1				1		
2789789778	Berry	Luke		306788051	1234567shrink99	08/26/1994	05589	000BD							1		
2789789778	Berry	Luke		306788051	1234567shrink99	08/26/1994	05507	000BD							1		
2789789778	Berry	Luke		306788051	1234567shrink99	08/26/1994	00562	000BD					1				
9145237862	Besanson	Orlando	A	741536644		02/29/2000		72199									
2675675675	Bistodeau	Justice		354006676		08/22/2008		72110									
5551116668	Blakeway	Gabriel		073815869		08/22/1994		72199									
0434343433	Boyarski	Katerina		632975049	fd4444444444446	02/01/2011	00562	000MX		1	1	1		1			
8567567564	Faucher	Dakota	B	261481783		12/14/2000	00562	000ZG									
123	Hutch	Ellis		394294299		08/27/2004	05589	YR0GA	1	1	1	1	1	1	1	1	1
4678678678	Kallenberger	Caroline		763364952	asdasdfasdf2345	08/27/1993	05589	000CH									
1576567567	Lichtenfeld	Ayana		372882527	eer4334443444	08/26/1994	00562	YM0ZG			1				1		

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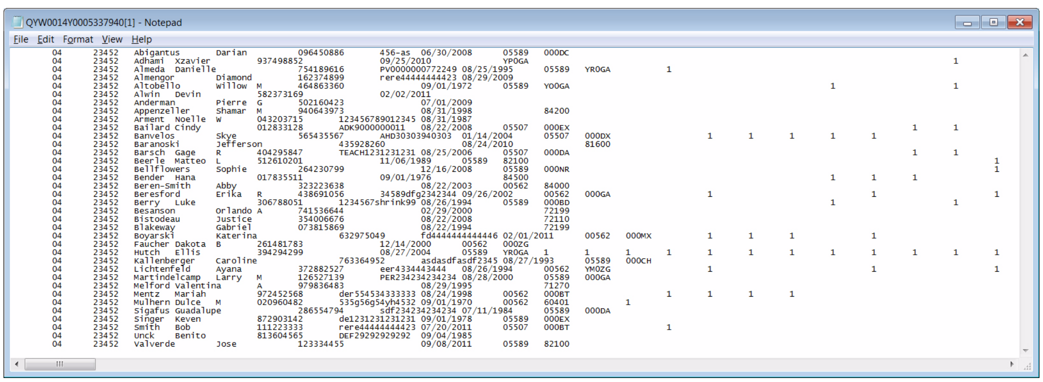
Sample Michigan REP Transmittal File


QYW0014Y0005337940[1] - Notepad

File Edit Format View Help

```
04   23452   Abigantus   Darian   096450886   456-as  06/30/2008   05589   000DC
04   23452   Adhami  Xzavier   937498852   09/25/2010   YP0GA   1
04   23452   Almeda  Danielle   754189616   PV0000000772249 08/25/1995   05589   YR0GA   1
04   23452   Almengor   Diamond   162374899   rere44444444423 08/29/2009
04   23452   Altobello   Willow  M   464863360   09/01/1972   05589   YO0GA   1   1
04   23452   Alwin   Devin   582373169   02/02/2011
04   23452   Anderman   Pierre  G   502160423   07/01/2009
04   23452   Appenzeller   Shamar  M   940643973   08/31/1998   84200
04   23452   Arment  Noelle  W   043203715   123456789012345 08/31/1987
04   23452   Bailard Cindy   012833128   ADK9000000011   08/22/2008   05507   000EX   1   1
04   23452   Banvelos   Skye   565435567   AHD30303940303  01/14/2004   05507   000DX   1   1   1   1   1
04   23452   Baranoski   Jefferson   435928260   08/24/2010   81600
04   23452   Barsch  Gage   R   404295847   TEACH1231231231 08/25/2006   05507   000DA   1   1
04   23452   Beerle  Matteo   L   512610201   11/06/1989   05589   82100   1
04   23452   Bellflowers   Sophie   264230799   12/16/2008   05589   000NR   1
04   23452   Bender  Hana   017835511   09/01/1976   84500   1   1   1
04   23452   Beren-Smith   Abby   323223638   08/22/2003   00562   84000
04   23452   Beresford   Erika   R   438691056   34589dfg2342344 09/26/2002   00562   000GA   1   1   1
04   23452   Berry   Luke   306788051   1234567shrink99 08/26/1994   05589   000BD   1   1
04   23452   Besanson   Orlando A   741536644   02/29/2000   72199
04   23452   Bistodeau   Justice   354006676   08/22/2008   72110
04   23452   Blakeway   Gabriel   073815869   08/22/1994   72199
04   23452   Boyarski   Katerina   632975049   fd4444444444446 02/01/2011   00562   000MX   1   1   1   1
04   23452   Faucher Dakota   B   261481783   12/14/2000   00562   000ZG
04   23452   Hutch   Ellis   394294299   08/27/2004   05589   YR0GA   1   1   1   1   1   1   1   1   1   1   1   1
04   23452   Kallenberger   Caroline   763364952   asdasdfasdf2345 08/27/1993   05589   000CH
04   23452   Lichtenfeld   Ayana   372882527   eer4334443444   08/26/1994   00562   YM0ZG   1   1   1
04   23452   Martindelcamp   Larry   M   126527139   PER23423423423 4 08/28/2000   05589   000GA
04   23452   Melford Valentina   A   979836483   08/29/1995   71270
04   23452   Mentz   Mariah   972452568   der554534333333 08/24/1998   00562   000BT   1   1   1   1
04   23452   Mulhern Dulce   M   020960482   535g56g54yh4532 09/01/1970   00562   60401   1
04   23452   Sigafus Guadalupe   286554794   sdf23423423423 4 07/11/1984   05589   000DA
04   23452   Singer  Keven   872903142   de1231231231231 09/01/1978   05589   000EX
04   23452   Smith   Bob   111223333   rere44444444423 07/20/2011   05507   000BT   1
04   23452   Unck    Benito   813604565   DEF29292929292  09/04/1985
04   23452   Valverde   Jose   123334455   09/08/2011   05589   82100
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