

# Michigan State Requirements

User Guide



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CHAPTER

## REPORT SETUP

#### **Overview**

This chapter provides information on setting up the user-defined fields necessary to processing Michigan State Requirement Reports.

1 "Michigan State Requirements Setup" on page 1-2 provides step-by-step information for the set up of the Michigan MERS Report. Setup must be completed before running this report.



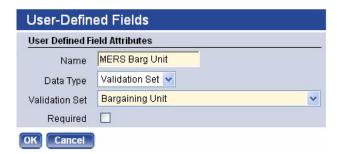
#### Michigan State Requirements Setup

The Michigan MERS Report requires that deductions and benefits fields are set up in User-Defined Fields. These fields accommodate contributions that are made from employees, in the form of payroll deductions, or employers, in the form of benefits. Then category codes must be added to the deduction and benefit fields. Contributions depend on the plan to which the employee belongs.

#### **Setting Up Deductions**

To set up deduction user-defined fields for the Michigan MERS Report:

- 1 From the Maintenance menu, select Logos Suite > Security > User-Defined Fields. The "User-Defined Field" page displays.
- **2** Select Deduction from the **Record Type** control.
- **3** Click the **New** button. The "User-Defined Fields" popup displays.



**4** Complete the fields *exactly* as follows:

Table 1.1

Control	Value
Name	MERS Barg Unit
Data Type	Validation Set
Validation Set	Bargaining Unit
Required	Unselected

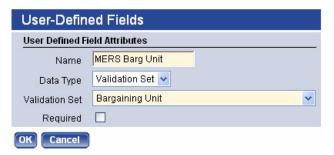
5 Click OK.



#### **Setting Up Benefits**

To set up benefit user-defined fields for the Michigan MERS Report:

- 1 From the Maintenance menu, select Logos Suite > Security > User-Defined Fields. The "User-Defined Field List" page displays.
- **2** Select Benefit from the **Record Type** control.
- **3** Click the **New** button. The "User-Defined Fields" popup displays.



**4** Complete the fields *exactly* as follows:

Table 1.2

Control	Value
Name	MERS Barg Unit
Data Type	Validation Set
Validation Set	Bargaining Unit
Required	Unselected

5 Click OK.

#### **Setting Up Bargaining Unit Values**

To set up values for the MERS Bargaining Unit validation set:

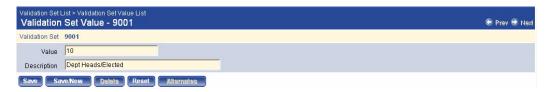
- 1 From the Maintenance menu, select Logos Suite > System > Validation Sets > Validation Set List. The "Validation Set List" page displays.
- **2** Highlight the Bargaining Unit row.



**3** Click the **Values** button. The "Validation Set Values List" page for Bargaining Unit displays.



4 Click the **New** button. The "Validation Set Value" page displays.



- **5** Enter the appropriate value and description as needed.
- 6 Click the Save/New button to save the entries and clear the controls.
- **7** Repeat Steps 5 and 6 to set up the remainder of the MERS Bargaining Unit values.



If the gross wage has to be included in the includible earnings, select Accrual Payout as the Reason on the "Employee Hours Entry" page. This entry also is part of a validation set.

# C H A P T E R

## **REPORTS**

#### **Overview**

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

http://www.michigan.gov

### 🧷 NOTE:

The reports described in this chapter require that benefit groups and hour codes are set up in Human Resources Maintenance.

- 1 "Michigan Quarterly Tax and Wage Report" on page 2-2 allows authorized users to select the information that appears on the Michigan Quarterly Tax and Wage Report and submit it to myReports.
- 2 "Michigan MERS Report" on page 2-6 allows authorized users to select the information that appears on the Michigan MERS Report and submit it to myReports.



#### Michigan Quarterly Tax and Wage Report

The "Michigan Quarterly Tax and Wage Report" page, accessed from the Human Resources menu (Human Resources > State Requirements > MI > Quarterly Tax and Wage Report), enables authorized users to select the information that appears on the Michigan Quarterly Tax and Wage Report and submit it to myReports. For a description of the procedures that can be performed on this page, please refer to Chapter 3, "Procedures."



#### **Entry Control Descriptions**

Table 2.1 "Michigan Quarterly Tax and Wage Report" Controls

Control	Description
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is blank>.
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Distribution Group	This control identifies the group to which the report will be distributed. The report will be sent to myReports for each user in the group.
Email Group	This control identifies the group to which the report will be e-mailed.
Submission Period	This section groups submission period information for the report.
Quarter	This control is required. It contains the quarter for which you want to run the report. The available options are 1 through 4. The default selection is 1.
Year	This control is required. It contains the year for which you want to run the report. The acceptable range is 2001 through 2999. The current year is the default.
Account Number	This control is required. It contains the employer's account number.



 Table 2.1
 "Michigan Quarterly Tax and Wage Report" Controls (continued)

Control	Description
Taxable Wage Limit	This control is required. It contains the taxable wage limit for which you want to run the report. The <i>Taxable Wage Limit</i> acceptable range is \$0.01 through \$9,999,999.99.
Create Disk File	Selecting this control will create the transmittal file. The default is deselected.

#### **Benefit Groups Tab**

As the default visible tab of the "Michigan Quarterly Tax and Wage Report" page, the "Benefit Groups" tab enables users to specify the benefit groups to include on the report.

#### Benefit Groups Tab Entry Control Descriptions

Table 2.2 "Michigan Quarterly Tax and Wage Report" Benefit Groups Tab Controls

Control	Description
Available Benefit Group(s)	This control displays all benefit groups to which the user has authority. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups.
Selected Benefit Group(s)	This control displays all benefit groups that have been selected to include on the listing. At least one benefit group must be selected. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups.

#### Benefit Groups Tab Command Buttons

Table 2.3 "Michigan Quarterly Tax and Wage Report" Benefit Groups Tab Command Buttons

Button	Description
Add	This button moves all selected benefit groups in the Available Benefit Group(s) multi-select textbox to the Selected Benefit Group(s) multi-select textbox. If no benefit groups are listed in the Available Benefit Group(s) multi-select textbox, the Add command button is disabled.
Add All	This button moves all benefit group(s) from the <i>Available Benefit Group(s)</i> multi-select textbox to the <i>Selected Benefit Group(s)</i> multi-select textbox. If no benefit groups are listed in the <i>Available Benefit Group(s)</i> multi-select textbox, the <b>Add All</b> command button is disabled.
Remove	This button moves all selected benefit groups from the Selected Benefit Group(s) multi-select textbox to the Available Benefit Group(s) multi-select textbox. If no benefit groups are listed in the Selected Benefit Group(s) multi-select textbox, the <b>Remove</b> command button is disabled.
Remove All	This button moves all benefit groups from the Selected Benefit Group(s) multi-select textbox to the Available Benefit Group(s) multi-select textbox. If no benefit groups are listed in the Selected Benefit Group(s) multi-select textbox, the <b>Remove All</b> command button is disabled.

#### **Hour Codes Tab**

The "Hour Codes" tab enables users to specify the hours codes to include on the report.



#### Hour Codes Tab Entry Control Descriptions

Table 2.4 "Michigan Quarterly Tax and Wage Report" Hour Codes Tab Controls

Control	Description
Available Hour Code(s)	This control displays all hour codes to which the user has authority. Users may use Ctrl+Click to select multiple hour codes or Shift+Click to select a range of hour codes.
Selected Hour Code(s)	This control displays all hour codes that have been selected to include on the listing. At least one hour code must be selected. Users may use Ctrl+Click to select multiple hour codes or Shift+Click to select a range of hour codes.

#### Hour Codes Tab Command Buttons

 Table 2.5
 "Michigan Quarterly Tax and Wage Report" Hours Codes Tab Command Buttons

Button	Description
Add	This button moves all selected hour codes in the <i>Available Hour Code(s)</i> multi-select textbox to the <i>Selected Hour Code(s)</i> multi-select textbox. If no hour codes are listed in the <i>Available Hour Code(s)</i> multi-select textbox, the <b>Add</b> command button is disabled.
Add All	This button moves all hour code(s) from the <i>Available Hour Code(s)</i> multi-select textbox to the <i>Selected Hour Code(s)</i> multi-select textbox. If no hour codes are listed in the <i>Available Hour Code(s)</i> multi-select textbox, the <b>Add All</b> command button is disabled.
Remove	This button moves all selected hour codes from the Selected Hour Code(s) multi-select textbox to the Available Hour Code(s) multi-select textbox. If no hour codes are listed in the Selected Hour Code(s) multi-select textbox, the <b>Remove</b> command button is disabled.
Remove All	This button moves all hour codes from the Selected Hour Code(s) multi-select textbox to the Available Hour Code(s) multi-select textbox. If no hour codes are listed in the Selected Hour Code(s) multi-select textbox, the <b>Remove All</b> command button is disabled.

#### **Command Buttons**

Table 2.6 "Michigan Quarterly Tax and Wage Report" Command Buttons

Button	Description
Print	This button automatically sends the "Michigan Quarterly Tax and Wage Report" to myReports.
Reset	This button updates the page and sets the data in the controls to the state they were in when the page was last saved.
Save	If the report settings have not yet been saved, this button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>Quarter</i> control. When changes are made to a previously saved report, any changes are saved to the report settings and the cursor focus is placed in the <i>Quarter</i> control. This button is hidden if the user does not have the appropriate security permissions.



Table 2.6 "Michigan Quarterly Tax and Wage Report" Command Buttons (continued)

Button	Description
Save As	This button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>Quarter</i> control. This button is hidden if the user does not have the appropriate security permissions.
Delete	Enabled only if the <i>Load Saved Report</i> option was used, this button prompts the user to delete the current report settings. When <b>OK</b> is clicked, the saved report settings are deleted, all controls are cleared, and the cursor focus is placed in the <i>Quarter</i> control. This button is hidden if the user does not have the appropriate security permissions.

#### **Report Output**

Generated via the "Michigan Quarterly Tax and Wage Report" page, the report provides users with information detailing employee wages for the quarter and year selected. A sample report appears below.

	Wiich	ıgan Qu	ıarterly Tax And Wa	ige Kepoi	·t
Hire Date	SSN	Name			Quarterly Wages
	514-66-6782	Benedic	t, Wm. Reed		\$1,200.00
	344-40-4598	Bower, B	Brian		\$2,013.38
	347-64-3434	Brach-str	ong, Jason		\$3,215.38
	480-76-8368	Brownso	n, Ann		\$1,760.00
	354-48-8182	Clark, Je	anette		\$950.77
	350-40-8242	Dunn, Ja	imes		\$1,999.99
	430-62-8832	Grewell,	Janice		\$1,760.00
	340-34-6059	Gueldne	r, Gany		\$1,760.00
	337-62-0358	Inyart, Jo	ohn		\$2,400.00
	337-60-5409	Jacobs,	Timothy		\$1,760.00
	362-52-3712	Lahr, Jet	ffrey		\$2,200.00
Total Wages :		\$21,019.52	FUI Exempt Wages :	\$0.00	
Federal Taxable Wa	ages:	\$19,550.85	FUI Taxable Wages :	\$21,019.52	
Federal Tax Withhe	ld:	\$1,936.41	Total Employees :	11	
State Taxable Wage	es:	\$19,550.85	Number Of Employees in Month 1:		
State Tax Withheld	:	\$544.99	Number Of Employees in Month 2 :		
FICA Taxable Wages : \$17,2		\$17,209.20	Number Of Employees in Month 3 :		
FICA Tax Withheld	:0	\$1,066.97			
Medicare Taxable \	Wages :	\$20,006.54			
Medicare Tax Withh	neld :	\$290.10			

#### Report Fields

Table 2.7 "Michigan Quarterly Tax and Wage Report" Fields

Column	Description
Hire Date	This column displays the employee's date of hire.
SSN	This column displays the employee's social security number.
Name	This column displays the employee's name.
Quarterly Wages	This column displays the employee's gross wages for the quarter selected.



#### Michigan MERS Report

The "Michigan MERS Report" page, accessed from the Human Resources menu (Human Resources > State Requirements > MI > MERS Report), enables authorized users to select the information that appears on the Michigan MERS Report and submit it to myReports. For a description of the procedures that can be performed on this page, please refer to Chapter 3, "Procedures."



#### **Entry Control Descriptions**

Table 2.8 "Michigan MERS Report" Controls

Control	Description
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is <black>.</black>
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Distribution Group	This control identifies the group to which the report will be distributed. The report will be sent to myReports for each user in the group.
Email Group	This control identifies the group to which the report will be e-mailed.
From Date	This control is required. It contains the beginning date of the date range the report data will cover.
To Date	This control is required. It contains the ending date of the date range the report data will cover.
Municipality Number	This control is required. It contains the number assigned to the municipality. The entry is numeric only. It may contain four digits.
Reporting Unit Number	This control is required. It contains the number assigned to the reporting unit. The default entry is 01.
File Format	This control identifies the format of the file. The available selections are Delimited and CSV. The default selection is Delimited.



#### **Command Buttons**

Table 2.9 "Michigan MERS Report" Command Buttons

Button	Description
Print	This button automatically sends the "Michigan Quarterly Tax and Wage Report" to myReports.
Reset	This button updates the page and sets the data in the controls to the state they were in when the page was last saved.
Save	If the report settings have not yet been saved, this button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>From Date</i> control. When changes are made to a previously saved report, any changes are saved to the report settings and the cursor focus is placed in the <i>From Date</i> control. This button is hidden if the user does not have the appropriate security permissions.
Save As	This button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>From Date</i> control. This button is hidden if the user does not have the appropriate security permissions.
Delete	Enabled only if the <i>Load Saved Report</i> option was used, this button prompts the user to delete the current report settings. When <b>OK</b> is clicked, the saved report settings are deleted, all controls are cleared, and the cursor focus is placed in the <i>From Date</i> control. This button is hidden if the user does not have the appropriate security permissions.

#### **Report Output**

Generated via the "Michigan MERS Report" page, the report provides users with information detailing employee termination dates, gross and excluded wages, contributions, service exceptions, statuses, includible earnings, and bargaining units for the date range selected. A sample report appears below.

New World City  Michigan MERS Report  From Date: 01.01/2005 - To Date: 12/31/2005									
Employee	SSN	Termination Date	Gross Wages	Excluded Wages	Contribution	Service Exception	Retired/Disabled	Includibl Earning	
Bargaining Unit - a									
Bailey,Kevin	999-26-5099		\$29,647.14	\$29,647.14	\$523.60	No	No	\$0.00	No
Baker, Eric Scott	556-46-1999		\$21,766.63	\$21,766.63	\$0.00	No	No	\$0.00	No
Ball,Carl	999-11-7399		\$27,898.91	\$27,898.91	\$1,310.40	No	No	\$0.00	No
Brach, Curtis	999-26-3099		\$47,918.68	\$47,918.68	\$0.00	Yes	No	\$0.00	No
Brach, David	999-44-6799		\$35,177.70	\$35,177.70	\$1,098.00	No	No	\$0.00	No
Brach,Kathleen	999-45-1999		\$28,014.56	\$28,014.56	\$585.20	No	No	\$0.00	No
Distefano,Paul	999-83-1499		\$29,178.28	\$29,178.28	\$854.00	No	No	\$0.00	No
Fathauer,Robert	939-02-6611		\$32,424.12	\$32,424.12	\$1,061.20	No	No	\$0.00	No
Goodwin, Edward	999-06-2299		\$28,119.93	\$28,119.93	\$630.00	No	No	\$0.00	No
HALL,Brian a	939-16-7044		\$15,052.20	\$15,052.20	\$0.00	No	No	\$0.00	No
Howell,Kenneth	999-03-4499		\$25,012.77	\$25,012.77	\$742.00	No	No	\$0.00	No
Keefer,Dwayne	999-66-6699		\$25,322.03	\$25,322.03	\$607.60	No	No	\$0.00	No
Lawrence, Billy	999-82-9899		\$27,377.39	\$27,377.39	\$742.00	No	No	\$0.00	No
Livingston, Patrick	939-37-6044		\$38,564.61	\$38,564.61	\$854.00	No	No	\$0.00	No
O'Neil,Sheryl	999-24-0399		\$31,338.48	\$31,338.48	\$753.20	No	No	\$0.00	No
Olson,Kristin	999-06-0299		\$25,783.18	\$25,783.18	\$523.60	No	No	\$0.00	No
		a - Totals	\$468,596.61	\$468,596.61	\$10,284.80			\$0.00	
		Grand Totals:	\$468,596,61	\$468,596,61	\$10,284.80			\$0.00	



#### Report Fields

Table 2.10 "Michigan MERS Report" Fields

Column	Description
Employee	This column displays the employee's name.
SSN	This column displays the employee's social security number.
Termination Date	This column displays the date of the employee's termination.
Gross Wages	This column displays the employee's gross wages for the date range selected.
Excluded Wages	This column displays the employee's excluded wages for the date range selected.
Contribution	This column displays the sum of employee deduction and benefit amounts.
Service Exception	This column displays service exception information.
Retired/Disabled	This column displays whether the employee is retired or disabled.
Includible Earnings	This column displays the employees includible earnings for the date range selected.
Multiple Barg Units	This column displays bargaining unit information.

## **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 2, "Reports."



#### **Saving Report Settings**

Use this procedure to save report settings for future use.

- 1 From the **Human Resources** > **State Requirements** > **MI** > [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 2, "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**

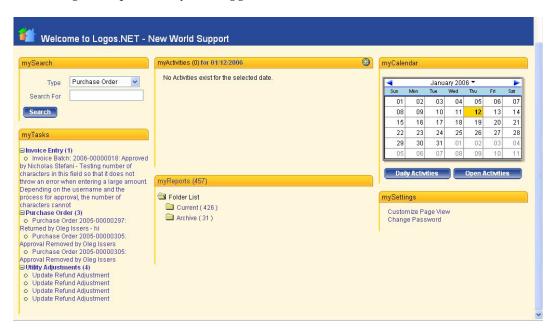
Use this procedure to load saved settings for the selected report.

- 1 From the **Human Resources** > **State Requirements** > **MI** > [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.

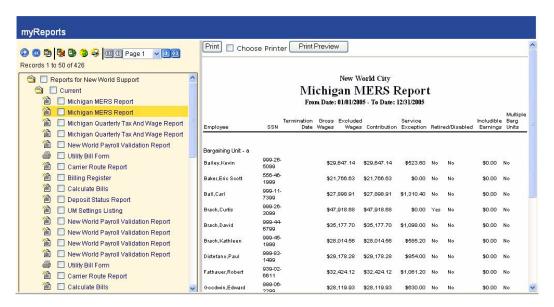


When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:





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** button.

#### **Procedures**

Printing a Report

