



Minnesota State Requirements

User Guide



© 2011 New World Systems Corporation. All Rights Reserved.

All rights reserved. Information within this document is the sole property of New World Systems Corp. and is protected by copyright and or trade secret regulations. Unauthorized copying or dissemination of this information without the written permission of New World Systems is strictly prohibited. Information within this document is subject to change without notice.

Printed in the United States of America



Contents

Report Setup 1-1

Overview	1-1
User Defined Fields Setup	1-2
Setting Up Deductions	1-2
Setting Up Benefits	1-4
Setting Up Hours Codes	1-5
Setting Up Employees	1-7
Setting Up PERA Plans	1-9

Reports 2-1

Overview	2-1
Minnesota Quarterly Tax and Wage Report	2-2
Benefit Groups Tab	2-3
Hour Codes Tab	2-4
Command Buttons	2-5
Report Output	2-6
Creating Minnesota PERA Data	2-7
Entry Control Descriptions	2-7
Command Buttons	2-7
Minnesota PERA List	2-8
Search Control Descriptions	2-9
Search Command Buttons	2-9
List Results for PERA Search	2-9
Command Buttons	2-10
Minnesota PERA Entry	2-11
Entry Control Descriptions	2-11
Command Buttons	2-12
Minnesota PERA Report	2-13
Entry Control Descriptions	2-13
Command Buttons	2-13
Report Output	2-14

Procedures 3-1

Overview	3-1
Saving Report Settings	3-2
Loading a Saved Report	3-3
Printing a Report	3-4

REPORT SETUP

Overview

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

- 1 “User Defined Fields Setup” on page 1-2 details how to set up benefits and deductions as user-defined fields that can be assigned a PERA category code.

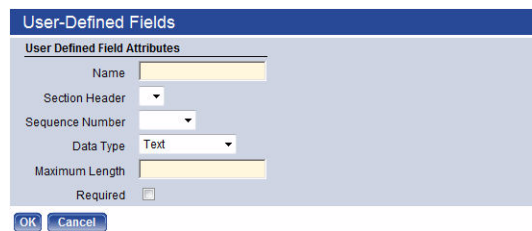
User Defined Fields Setup

The Minnesota PERA Report requires that deductions and benefits fields are set up in User-Defined Fields. These fields accommodate contributions to PERA 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 to PERA depend on the plan to which the employee belongs.

Setting Up Deductions

To set up **deduction** user-defined fields for the Minnesota PERA 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
<i>Name</i>	MNPERA
<i>Data Type</i>	Text
<i>Maximum Length</i>	1
<i>Required</i>	Unselected

- 5 Click **OK**.

To set up category codes for **deductions**:

- 1 From the **Maintenance** menu, select **Human Resources > Deductions and Benefits > Deductions**. The “Deduction List” page displays.
- 2 Highlight the row of the deduction in the list for which you want to add a PERA category code.

- 3 Click the **User Defined Fields** button. The “Deduction Code User Defined Fields” page displays.

Deduction List
Deduction Code User Defined Fields - 145

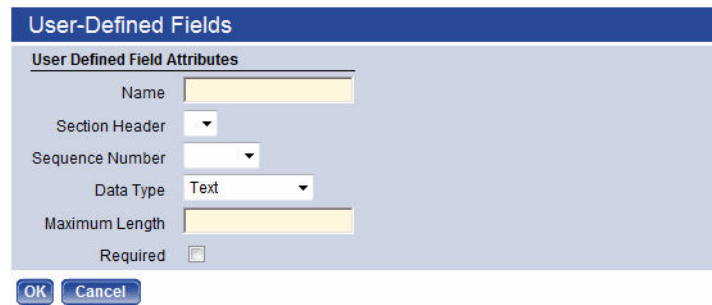
Name	Value
2004W2Box10	
2004W2Box12	
2004W2Box14	MedRe
MNPERS	

- 4 Click the MNPERS row in the table to highlight it. Click it again to put the row in EDIT mode.
- 5 To indicate that this deduction should be included as a member contribution, enter a “C” in the *Value* control.
- 6 Click **Save**.
- 7 Repeat Steps 2-6 for the remainder of the deductions for which you want to add a PERS category code.

Setting Up Benefits

To set up **benefit** user-defined fields for the Minnesota PERA 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
<i>Name</i>	MNPERA
<i>Data Type</i>	Text
<i>Maximum Length</i>	1
<i>Required</i>	Unselected

- 5 Click **OK**.

To set up category codes for **benefits**:

- 1 From the **Maintenance** menu, select **Human Resources > Deductions and Benefits > Benefits**. The “Benefit List” page displays.
- 2 Highlight the row of the benefit in the list for which you want to add a PERA category code.

- 3 Click the **User Defined Fields** button. The “Benefit Code User Defined Fields” page displays.

Benefit List
Benefit Code User Defined Fields - Profit

Name	Value
2003W2Box10	Y
2003W2Box12	
2003W2Box14	ProfS
2004W2Box10	
2004W2Box12	
2004W2Box14	
NVPERS	

- 4 Click the PERA row in the table to highlight it. Click it again to put the row in EDIT mode.
- 5 Enter the appropriate value as needed for the codes:

Table 1.3

Value	Meaning
C	Benefit is included as an employer contribution.
A	Benefit is included as an additional employer contribution

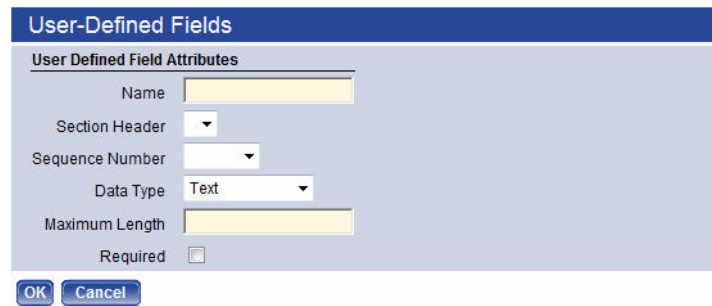
- 6 Click **Save**.
- 7 Repeat Steps 2-6 for the remainder of the benefits for which you want to add a PERA category code.

Setting Up Hours Codes

To set up **hours codes** user-defined fields for the Minnesota PERA Report:

- 1 From the **Maintenance** menu, select **Logos Suite > Security > User-Defined Fields**. The “User-Defined Field” page displays.
- 2 Select Hours Code from the **Record Type** control.

- Click the **New** button. The “User-Defined Fields” popup displays.



The image shows a 'User-Defined Fields' popup window. It has a title bar 'User-Defined Fields' and a section 'User Defined Field Attributes'. The attributes are: Name (text input), Section Header (dropdown), Sequence Number (dropdown), Data Type (Text dropdown), Maximum Length (text input), and Required (checkbox). At the bottom are 'OK' and 'Cancel' buttons.

- Complete the fields *exactly* as follows:

Table 1.4

Control	Value
<i>Name</i>	MNPERA
<i>Data Type</i>	Text
<i>Maximum Length</i>	2
<i>Required</i>	Unselected

- Click **OK**.

To set up category codes for **hours codes**:

- From the **Maintenance** menu, select **Human Resources > Earnings Maintenance > Hours Codes**. The “Hours Codes List” page displays.
- Highlight the row of the hour code in the list for which you want to add a PERA category code.

- 3 Click the **User Defined Fields** button. The “Deduction Code User Defined Fields” page displays.

Deduction List
Deduction Code User Defined Fields - 145

Name	Value
2004W2Box10	
2004W2Box12	
2004W2Box14	MedRe
MNPERS	

- 4 Click the MNPERS row in the table to highlight it. Click it again to put the row in EDIT mode.
- 5 Enter the appropriate value as needed for the codes:

Table 1.5

Value	Meaning
01	Regular service activity.
02	Lump sum of unused accrued comp time.
04	Grievance pay.
05	Lump sum payments that have a retroactive earnings period.
06	Omitted deduction from earnings of member.

- 6 Click **Save**.
- 7 Repeat Steps 2-6 for the remainder of the hours codes for which you want to add a PERA category code.

Setting Up Employees

To set up an MNPERSExclusionCode employee user-defined field for the Minnesota PERA Report,

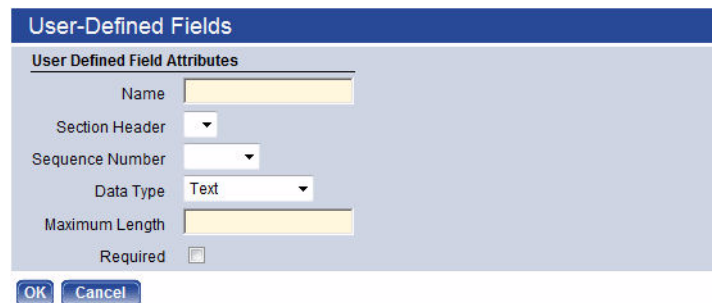
- 1 From the **Maintenance** menu, select Logos Suite > System > Validation Sets > Validation Set List.

- 2 Click the **New** button. The “Validation Set” popup displays.
- 3 Complete the fields *exactly* as follows:

Table 1.6

Control	Value
<i>Number</i>	9921
<i>Name</i>	Employee UDF - PERA Exclusion
<i>Description</i>	Employee UDF - PERA Exclusion

- 4 Click **OK**.
- 5 Highlight the new validation set (9921).
- 6 Click the **Values** button. The “Validation Set Values List” page displays.
- 7 Click the **New** button.
- 8 The Validation Set Value page displays.
- 9 Type **000** as the *Value*. Employees who are assigned this value will appear on the PERA report. Employees who are assigned any other values will appear on the exclusion report.
- 10 From the **Maintenance** menu, select **Logos Suite > Security > User-Defined Fields**. The “User-Defined Field” page displays.
- 11 Select Employee from the **Record Type** control.
- 12 Click the **New** button. The “User-Defined Fields” popup displays.



- 13 Complete the fields *exactly* as follows:

Table 1.7

Control	Value
<i>Name</i>	MNPERAExclusionCode
<i>Section Header</i>	Minnesota
<i>Sequence Number</i>	2
<i>Data Type</i>	Validation Set

Table 1.7

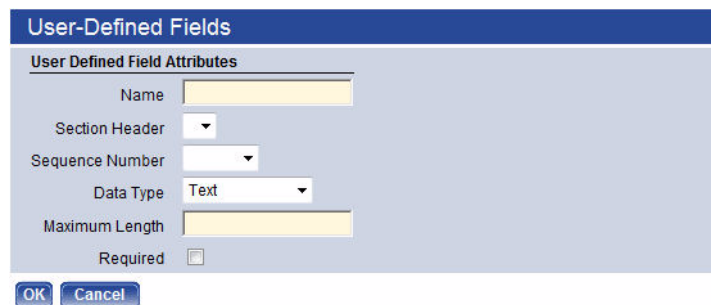
Control	Value
<i>Validation Set</i>	Employee UDF - PERA Exclusion
<i>Required</i>	Unselected

14 Click OK.

Setting Up PERA Plans

To set up PERA plan user-defined fields for the Minnesota PERA Report,

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



- 4 Complete the fields *exactly* as follows:

Table 1.8

Control	Value
<i>Name</i>	MNPERA
<i>Data Type</i>	Text
<i>Maximum Length</i>	2
<i>Required</i>	Unselected

- 5 Click **OK**.

To add a PERA plan to an employee:

- 1 From the **Human Resources** menu, select **Human Resources > Employee Maintenance**. The “Employee List” page displays.
- 2 Use the Search controls to find the employee for whom you want to add a PERA plan.
- 3 Click the *Employee Number* hyperlink for the employee on which you performed the search.
- 4 Select User Defined in the *Attribute* control.

- 5 Click the MNPERA row in the table to highlight it. Click it again to put the row in EDIT mode.
- 6 Enter the appropriate value for the following codes:

Table 1.9

Value	Meaning
01	Basic PERA plan
02	Coordinated PERA plan
03	Police and Fire PERA plan
07	Privatization PERA plan
11	Correctional PERA plan
14	DCP Ambulance PERA plan
15	DCP Physician PERA plan
16	DCP Elected Official PERA plan
99	Exempt PERA plan

- 7 Click **Save**.
- 8 Repeat Steps 2-7 for the remainder of the employees for whom you want to add a PERA plan.

REPORTS

Overview

This chapter provides detailed window and field information for Minnesota 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.state.mn.us>


 **NOTE:**

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

- 1 “Minnesota Quarterly Tax and Wage Report” on page 2-2 provides specific window and field information for the “Minnesota Quarterly Tax and Wage Report” page. For a description of the procedures that can be performed from this page, please refer to Chapter 3, “Procedures.”
- 2 “Creating Minnesota PERA Data” on page 2-7 provides step-by-step information for the set up of the Minnesota PERA (Public Employees Retirement Association) Report.
- 3 “Minnesota PERA List” on page 2-8 allows the user to view current PERA data.
- 4 “Minnesota PERA Entry” on page 2-11 allows the user to add and edit PERA data.
- 5 “Minnesota PERA Report” on page 2-13 creates a report and transmittal file of the PERA data.

Minnesota Quarterly Tax and Wage Report

The “Minnesota Quarterly Tax and Wage Report” page, accessed from the Human Resources menu (**Human Resources > State Requirements > MN > Quarterly Tax and Wage Report**), enables authorized users to select the information that appears on the Minnesota 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 “Minnesota Quarterly Tax and Wage Report” Controls

Control	Description
<i>Load Saved Report</i>	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>.
<i>Submission Period</i>	This section groups submission period information for the report.
<i>Quarter</i>	This control enables you to select the quarter for which you want to run the report. The available options are 1-4. The default selection is 1.
<i>Year</i>	This control enables you to specify the year for which you want to run the report. This control is required. The acceptable range is 2001 - 2999. The current year is the default.
<i>Minnesota UC Account Number</i>	This control enables you to specify the transmitter’s state unemployment insurance account number for the report. This control is required. This number is assigned by the State of Minnesota to the employer. It may contain ten digits.
<i>Create Disk File</i>	This control indicates whether you want to create a file that can be saved to a disk. If this control is selected, the system will open a standard Microsoft File Download dialog when the report is submitted. This dialog enables you to specify the file location and file type.

Benefit Groups Tab

As the default visible tab of the “Minnesota Quarterly Tax and Wage Report” page, the “Benefit Groups” tab enables users to specify the benefit groups to include on the report. This tab is shown as the default under “Minnesota Quarterly Tax and Wage Report” on page 2-2.

Benefit Groups Tab Entry Control Descriptions

Table 2.2 “Minnesota Quarterly Tax and Wage Report” Benefit Groups Tab Controls

Control	Description
<i>Available Benefit Group(s)</i>	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.
<i>Selected Benefit Group(s)</i>	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 “Minnesota Quarterly Tax and Wage Report” Benefit Groups Tab Command Buttons

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

Hour Codes Tab

The “Hour Codes” tab on the “Minnesota Quarterly Tax and Wage Report” page enables users to specify the hour codes to include on the report.



Hour Codes Tab Control Descriptions

Table 2.4 “Minnesota Quarterly Tax and Wage Report” Hour Codes Tab Controls

Control	Description
<i>Available Hour Code(s)</i>	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.
<i>Selected Hour Code(s)</i>	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 “Minnesota Quarterly Tax and Wage Report” Hour 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 Add command button is disabled.
Add All	This button moves all hour codes 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 Add All command button is disabled.
Remove	This button moves all selected hour codes from the <i>Selected Hour Code(s)</i> multi-select textbox to the <i>Available Hour Code(s)</i> multi-select textbox. If no hour codes are listed in the <i>Selected Hour Code(s)</i> multi-select textbox, the Remove command button is disabled.
Remove All	This button moves all hour codes from the <i>Selected Hour Code(s)</i> multi-select textbox to the <i>Available Hour Code(s)</i> multi-select textbox. If no hour codes are listed in the <i>Selected Hour Code(s)</i> multi-select textbox, the Remove All command button is disabled.

Command Buttons

Table 2.6 “Minnesota Quarterly Tax and Wage Report” Command Buttons

Button	Description
Submit	This button automatically sends the “Minnesota 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 OK 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.
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 OK 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 OK 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 “Minnesota Quarterly Tax and Wage Report” page, the report provides users with information detailing the gross quarterly wages paid to each employee, and the employee’s hours worked. Use this report as a guide for preparing the Minnesota Quarterly Tax and Wage Report. A sample report appears below.

New World Systems Minnesota Quarterly Tax and Wage Report			
Social Security Number	Name	Gross Wages	Hours Worked
939-19-6455	Douglas S Baker	10,031.56	157.15
939-54-4044	Brian Pamperin	13,683.04	0.00
939-14-3200	Joe X Bower	105.00	7.00
949-39-7600	Ann Brading	44.00	2.00
939-30-6211	Curtis Brownson	19,411.56	108.15
939-94-6633	Janetta Buscher	9,342.34	128.39
939-23-3444	Roscoe Combs	2,692.34	0.00
939-69-5499	Dorthea Cougill	10,815.00	161.62
949-89-6200	Janice Goddard	22.00	1.00
939-06-3400	Guy Greenwell	88.00	4.00
939-30-6277	John Gualther	105.00	7.00
939-45-6077	Timothy Hysat	66.00	3.00
939-86-6833	Todd Jacobs	12,553.10	166.42
939-18-2866	Marjorie Kiblar	1,346.17	0.00
939-45-1666	Ronnie Knoop	90.00	6.00
939-66-7855	Tamara Lerman	15,325.94	144.89
939-07-4822	Deborah Mosttagh	9,983.05	85.64
939-69-5488	Brian Muller	66.00	3.00
949-60-9688	Steve Myerscough	88.00	4.00
939-17-6066	Deborah Pamperin	9,469.74	214.92
939-36-4077	Larry Pittman	1,346.17	0.00
939-55-6200	Lorelei Ramsels	1,346.17	0.00
939-36-6411	Richard Sims	23,761.35	168.31
939-35-3211	John Smith	1,346.17	0.00
939-87-4400	William Wrenett	66.00	3.00
939-55-4255	Jerry Wood	12,234.81	628.69
939-40-7277	Caryll Dittamore	6,699.59	83.39
939-59-5288	Brian Applegate	10,776.06	146.15
939-93-8077	Diane Jones	7,631.38	103.39
939-63-0800	Corinne Ratliff	4,249.13	88.46
939-02-6222	Kendra Russell	7,839.28	248.92
939-62-5866	Jeffrey Sager	15,418.06	153.69
939-58-5900	Charles Finley	10,532.89	628.69
949-52-5622	Mary Allen	796.00	100.00
999-68-4100	Christopher Alt	1,500.72	222.00
939-07-6633	Isabelle Andrews	1,196.52	177.00

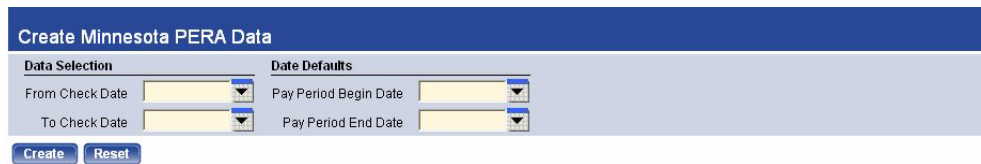
Report Fields

Table 2.7 “Minnesota Quarterly Tax and Wage Report” Fields

Column	Description
<i>SSN</i>	This column displays the Social Security Number of the employee.
<i>Name</i>	This column displays the name of the employee.
<i>Gross Wages</i>	This column displays the employee’s gross wages for the quarter selected.
<i>Hours Worked</i>	This column displays the number of hours the employee has worked during the quarter.

Creating Minnesota PERA Data

The “Minnesota PERA List” page provides step-by-step information for the set up of the Minnesota PERA (Public Employees Retirement Association) Report. Setup must be completed before running this report.



Entry Control Descriptions

Table 2.8 “Minnesota PERA List” Controls

Control	Description
<i>Data Selection</i>	This section organizes the date controls that determine what data will be selected to create PERA data.
<i>From Check Date</i>	This control is required. Enter the first check date that should be included in the data.
<i>To Check Date</i>	This control is required. Enter the last check date that should be included in the data.
<i>Date Defaults</i>	This section organizes the controls that determine the default dates for the data.
<i>Pay Period Begin Date</i>	This control is required. Enter the begin date that will appear on each created record.
<i>Pay Period End Date</i>	This control is required. Enter the end date that will appear on each created record.

Command Buttons

Table 2.9 “Minnesota PERA List” Command Buttons

Button	Description
Create	This button notifies the user that the previous work file will be cleared. If the user approves this, it clears the previous PERA data and inserts the current PERA data into the table.
Reset	This button clears the entry controls without saving any data, and returns the cursor focus to the <i>From Check Date</i> control.

Minnesota PERA List

The “Minnesota PERA List” page, accessed from the Human Resources menu (**Human Resources> State Requirements> MN> PERA List**), allows authorized users to review and maintain PERA information for each employee within an organization. When you first enter the page, you will see a screen like the following:

Minnesota PERA List

Employee
Plan

Search Reset

Employee	Plan	Total Wages	Total Deductions	Total Benefits	Total Additional Benefits
There are no items to show in this view					

New Delete Refresh Print

Once you click **Search** the list will populate with the results:

Minnesota PERA List					
Employee <input type="text"/>					
Plan <input type="text"/>					
Search Reset					
Employee	Plan	Total Wages	Total Deductions	Total Benefits	Total Additional Benefits
Brownson, Curtis	01	\$2,773.08	\$1,382.80	\$482.58	\$0.00
Baker, Douglas S	02	\$1,433.08	\$1,487.68	\$321.94	\$0.00
Buescher, Jeanette	02	\$1,334.62	\$389.88	\$424.96	\$0.00
Cougill, Dustha	02	\$1,545.00	\$1,324.12	\$331.81	\$0.00
Jacobs, Todd	02	\$1,793.30	\$2,145.16	\$400.44	\$0.00
Lanman, Tamara	02	\$2,189.42	\$1,460.36	\$199.71	\$0.00
Moshtagh, Deborah	02	\$1,426.15	\$434.60	\$426.11	\$0.00
Pamperin, Deborah	02	\$1,352.82	\$925.48	\$419.64	\$0.00
Sims, Richard	02	\$3,129.62	\$963.32	\$1,137.14	\$0.00
Dittamore, Caryll	02	\$961.54	\$322.72	\$385.13	\$0.00
Applegate, Brian	02	\$1,496.58	\$372.24	\$432.32	\$0.00
Jones, Diane	02	\$1,047.34	\$959.16	\$392.70	\$0.00
Russell, Kendra	02	\$1,107.04	\$1,025.80	\$335.63	\$0.00
Sager, Jeffrey	02	\$2,202.58	\$1,116.00	\$432.26	\$0.00
Cooley, Curtis	02	\$1,782.70	\$380.88	\$457.55	\$0.00
Craig, Roger	02	\$2,293.34	\$2,308.60	\$237.99	\$0.00
Ghibellini, Ted	02	\$2,691.62	\$1,689.64	\$6.60	\$0.00
Barber, George	02	\$1,004.54	\$879.36	\$371.46	\$0.00

New Delete Refresh Print

When a row is expanded, additional information displays for the employee:

Employee	Plan	Total Wages	Total Deductions	Total Benefits	Total Additional Benefits		
[-] Brownson, Curtis	01	\$2,773.08	\$1,382.60	\$482.58	\$0.00		
[-] Pay Type	StartDate	EndDate	Wages	Deduction	Benefit	AdditionBenefit	Hours
01	01/01/2005	01/14/2005	\$2,773.08	\$1,382.60	\$482.58	\$0.00	80
Employee	Plan	Total Wages	Total Deductions	Total Benefits	Total Additional Benefits		
[-] Baker, Douglas S	02	\$1,433.08	\$1,487.68	\$321.94	\$0.00		
[-] Pay Type	StartDate	EndDate	Wages	Deduction	Benefit	AdditionBenefit	Hours
01	01/01/2005	01/14/2005	\$1,433.08	\$1,487.68	\$321.94	\$0.00	80
Employee	Plan	Total Wages	Total Deductions	Total Benefits	Total Additional Benefits		
[-] Buescher, Jeanette	02	\$1,334.62	\$389.88	\$424.96	\$0.00		
[-] Cougill, Dustha	02	\$1,545.00	\$1,324.12	\$331.81	\$0.00		

Search Control Descriptions

Table 2.10 "Minnesota PERA List" Search Controls



Control	Description
<i>Employee</i>	Select the name of an employee if you want to search for results for one employee only.
<i>Plan</i>	Enter the two-character code for a plan if you want to search for results for all employees in a particular plan.

Search Command Buttons

Table 2.11 "Minnesota PERA List" Search Command Buttons

Button	Description
Search	This button sends a search message to the PERA data table and populates the grid with the results.
Reset	This button updates the page and sets the data in the controls to the state they were in when the page was opened.

List Results for PERA Search

The information is displayed in an expandable list that offers additional information for each employee. Clicking the  icon in PERA Search list expands the Employee list to display the Pay Type, Wages, Deduction, Benefit, Additional, Hours, Start Date, and End Date information. Clicking the  icon in PERA Search list collapses the Employee list and hides the Pay Type, Wages, Deduction, Benefit, Additional, Hours, Start Date, and End Date information.

The default sort order of the Employee list is by *Pay Type* (in descending order.) The *Pay Type* in the list is hyperlinked. Clicking on the link opens the "Minnesota PERA Entry" in EDIT mode with the cursor focus in the *Employee* control. The default sorting order of the PERA Search list is by *Employee* (alpha, descending order).

Table 2.12 "Minnesota PERA List" Grid

Column	Description
<i>Employee</i>	This column displays the employee's number within the organization and the employee's name.
<i>Plan</i>	This column displays the PERA plan to which the employee belongs.

Table 2.12 “Minnesota PERA List” Grid (continued)

Column	Description
<i>Total Wages</i>	This column displays the employee’s total wages paid for the current pay period.
<i>Total Deductions</i>	This column displays the employee’s total deductions taken for this pay period.
<i>Total Benefits</i>	This column displays the employee’s total benefits paid for this pay period.
<i>Total Additional Benefits</i>	This column displays the total amount of any additional benefits paid to the employee for this pay period.
<i>Pay Type</i>	This column displays the type of pay (e.g., regular, overtime, etc.). The <i>Pay Type</i> in the list is hyperlinked. Clicking on the link opens the “Minnesota PERA Entry” page.
<i>Wages</i>	This column displays the employee’s wages paid for this pay type.
<i>Deduction</i>	This column displays the employee’s deductions taken for this pay type.
<i>Benefit</i>	This column displays the employee’s benefits paid for this pay type.
<i>Additional</i>	This column displays the amount of any additional benefits paid to the employee for this pay type.
<i>Hours</i>	This column displays the number of hours the employee worked for this pay type in the current pay period.
<i>Start Date</i>	This column displays the start date of the pay period.
<i>End Date</i>	This column displays the end date of the pay period.

Command Buttons

Table 2.13 “Minnesota PERA List” Command Buttons

Button	Description
New	This button opens the “Minnesota PERA Entry” page in ADD mode with cursor focus in the <i>Employee</i> control.
Delete	This button is hidden if user does not have appropriate security permissions. If the user is authorized, it prompts the user to confirm deletion. If OK is clicked and a Pay Type row is highlighted, just that row is deleted. If an employee row is highlighted, all Pay Type rows for that employee are deleted. The system refreshes the list, and automatically highlights the first row in the list. If deleting the only row in the list, place cursor focus on the New command button.
Refresh	Performs a postback and keeps the selected row highlighted. If the selected row was deleted, automatically highlights the first row in the list. If there are no rows in the list, places cursor focus on the New command button.
Print	Opens the “Minnesota PERA Report” popup page.

Minnesota PERA Entry

The “Minnesota PERA Entry” page, accessed by clicking the **New** command button or the *Pay Type* hyperlink in the Employee grid on the “Minnesota PERA List” page, enables authorized users to add an employee to the PERA list or to maintain an employee already on the list.



Entry Control Descriptions

Table 2.14 “Minnesota PERA Entry” Controls

Control	Description
<i>Employee</i>	This control is required. Select the employee for whom you will create the PERA entry. This control is disabled in EDIT mode.
<i>Plan</i>	This control is required. Enter the two-digit plan number.
<i>Start Date</i>	This control is required. Enter the pay period start date.
<i>End Date</i>	This control is required. Enter the pay period end date.
<i>Pay Type</i>	This control is required. Enter the two-digit code that represents the pay type.
<i>Wages</i>	This control is required. Enter the wages the employee earned for this pay type. Acceptable values are 0.00 through 99,999,999.99.
<i>Deduction</i>	This control is required. Enter the deductions taken for the employee for this pay type. Acceptable values are 0.00 through 99,999,999.99.
<i>Benefit</i>	This control is required. Enter the benefits the employee earned for this pay type. Acceptable values are 0.00 through 99,999,999.99.
<i>Additional</i>	This control is required. Enter the additional benefits the employee earned for this pay type. Acceptable values are 0.00 through 99,999,999.99.
<i>Hours</i>	This control is required. Enter the number of hours the employee worked for this pay type in this pay period.
<i>Adjustment</i>	Select this box if this entry represents an adjustment.

Command Buttons

Table 2.15 “Minnesota PERA Entry” Command Buttons

Button	Description
OK	Adds or updates the information in the PERA data table, closes the popup, and returns the user to the “Minnesota PERA List” page.
Cancel	Clears the entry controls without saving and data or changes, closes the popup, and returns the user to the “Minnesota PERA List” page.

Minnesota PERA Report

The “Minnesota PERA Report” page, accessed from the Human Resources menu (**Human Resources > State Requirements > MN > PERA Report**) or by clicking the **Print** button on the “Minnesota PERA List” page, enables authorized users to produce the Minnesota PERA report.



Entry Control Descriptions

Table 2.16 “Minnesota PERA Report” Controls

Control	Description
<i>Load Saved Report</i>	This control allows users to retrieve selection criteria that has been previously defined. An unlimited number of selection criteria combinations for a listing can be stored.
<i>Override Report Title</i>	This control displays the title that will replace the default title on the printed report.
<i>Employer Number</i>	This control is required. Enter the six-digit unit number that identifies the employer.
<i>Paid Date</i>	This control is required. It displays the date payment was made for this pay period.
<i>Create Disk File</i>	This control indicates whether you want to save this file to a disk. If this control is selected, the system will open a standard Microsoft File Download dialog when the report is submitted. This dialog enables you to specify the file location and file type.

Command Buttons

Table 2.17 “Minnesota PERA Report” Command Buttons

Button	Description
Submit	This button automatically sends the Minnesota PERA Report to myReports .
Reset	Clears the entry controls and places the cursor focus in the <i>Employer Number</i> control.
Save	If the report settings have not yet been saved, opens a popup page that allows user to save the current report settings and assign a name to the settings so they can be used at a later date. When OK is clicked, saves the settings and closes the popup page. Places cursor focus in the <i>Report Through Date</i> control. When changes are made to a previously saved report, any changes are saved to the report settings and cursor focus is placed in the <i>Employer Number</i> control. Hidden if user does not have appropriate security permissions.

Table 2.17 “Minnesota PERA Report” Command Buttons (continued)

Button	Description
Save As	Opens a popup page that allows user to save the current report settings and assign a name to the settings so they can be used at a later date. When OK is clicked, saves the settings and closes the popup page. Places cursor focus in the <i>Employer Number</i> control. Hidden if user does not have appropriate security permissions.
Delete	Prompts user to delete the current report settings. When OK is clicked, deletes the saved report settings. Clears all controls and places cursor focus in the <i>Employer Number</i> control. Enabled only if the <i>Load Saved Report</i> option was used. Hidden if user does not have appropriate security permissions.

Report Output

Generated via the “Minnesota PERA Report” page, the report provides users with information about employee PERA contributions. Use this report as a guide for preparing the Minnesota PERA (Public Employees Retirement Association) Report. Data on the report is sorted by *Plan*, then by *Last Name*, then by *First Name*. It provides totals by plan, as well as grand totals. A sample report appears below.

New World Systems								
Minnesota PERA Report								
Paid Date 01/14/2005								
Name	Social Security Number	Pay Type	Hours	Wages	Deduction	Benefit	Begin Date	End Date
Plan: Basic								
Curtis Brownson	939-30-6211	01	80.00	2,773.08	1,382.60	482.58	1/1/2005	1/14/2005
Plan Total: 1,865.18			80.00	2,773.08	1,382.60	482.58		
Plan: Coordinated								
Brian Applegate	939-59-5288	01	80.00	1,496.58	372.24	432.32	1/1/2005	1/14/2005
Kevin Bailey	939-50-6200	01	80.00	1,953.04	756.00	567.71	1/1/2005	1/14/2005
Douglas S Baker	939-19-6455	01	80.00	1,433.08	1,487.68	321.94	1/1/2005	1/14/2005
George Barber	939-21-6200	01	80.00	1,994.54	878.36	371.46	1/1/2005	1/14/2005
Greg Bonner	939-31-6022	01	80.00	1,857.96	1,053.96	401.86	1/1/2005	1/14/2005
Jeanette Buschur	939-94-6633	01	80.00	1,334.62	389.88	424.96	1/1/2005	1/14/2005
Quincy Cain	939-31-5266	01	80.00	2,059.92	824.52	488.93	1/1/2005	1/14/2005
Curtis Cooley	939-21-5266	01	80.00	1,782.70	380.88	457.55	1/1/2005	1/14/2005
Durtha Cougill	939-68-5499	01	80.00	1,545.00	1,324.12	331.81	1/1/2005	1/14/2005
Roger Craig	939-21-5000	01	80.00	2,293.34	2,208.60	237.99	1/1/2005	1/14/2005
Caryll Dittamore	939-40-7277	01	80.00	961.54	322.72	385.13	1/1/2005	1/14/2005
Ted Ghisellini	939-77-4255	01	80.00	2,691.62	1,689.64	6.60	1/1/2005	1/14/2005
Todd Jacobs	939-86-6833	01	80.00	1,793.30	2,145.16	400.44	1/1/2005	1/14/2005
Diane Jones	939-93-8077	01	80.00	1,047.34	959.16	392.70	1/1/2005	1/14/2005
Chad Kiefer	939-09-8000	01	80.00	1,350.89	343.16	419.47	1/1/2005	1/14/2005
Timothy Lutzman	939-66-7855	01	80.00	2,189.42	1,460.36	199.71	1/1/2005	1/14/2005
Darrell Metzler	939-38-4400	01	80.00	2,563.43	1,644.84	300.32	1/1/2005	1/14/2005
Deborah Modighugh	939-07-4822	01	80.00	1,426.15	434.60	426.11	1/1/2005	1/14/2005
Jeanette Nichols	939-18-4844	01	80.00	923.08	166.16	88.02	1/1/2005	1/14/2005
Deborah Pampertin	939-17-6066	01	80.00	1,352.82	925.48	419.64	1/1/2005	1/14/2005
Kris Philpott	939-99-6255	01	80.00	2,305.92	2,002.40	300.32	1/1/2005	1/14/2005
Kendra Russell	939-02-6222	01	80.00	1,107.04	1,025.80	335.63	1/1/2005	1/14/2005
Jeffrey Sager	939-62-5866	01	80.00	2,202.58	1,116.00	432.26	1/1/2005	1/14/2005
Richard Sims	939-36-6411	01	80.00	3,129.62	963.32	1,137.14	1/1/2005	1/14/2005
Plan Total: 34,255.06			1,920.00	42,795.53	24,975.04	9,280.82		
Plan: Privatization								

Report Fields

Table 2.18 “Minnesota PERA List” Fields

Column	Description
<i>Name</i>	This column displays the employee’s full name.
<i>Social Security Number</i>	This column displays the employee’s Social Security Number.
<i>Pay Type</i>	This column displays the two-digit code that represents the pay type.
<i>Hours</i>	The column displays the number of hours worked by this employee for this pay type.

Table 2.18 "Minnesota PERA List" Fields (continued)

Column	Description
<i>Wages</i>	This column displays the wages the employee earned for this pay type.
<i>Deduction</i>	This column displays deductions taken for the employee for this pay type.
<i>Benefit</i>	This column displays the benefits the employee earned for this pay type.
<i>Begin Date</i>	This column displays the pay period start date.
<i>End Date</i>	This column displays the pay period end date.

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 > MN > [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:



Please enter a new report criteria name

- 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

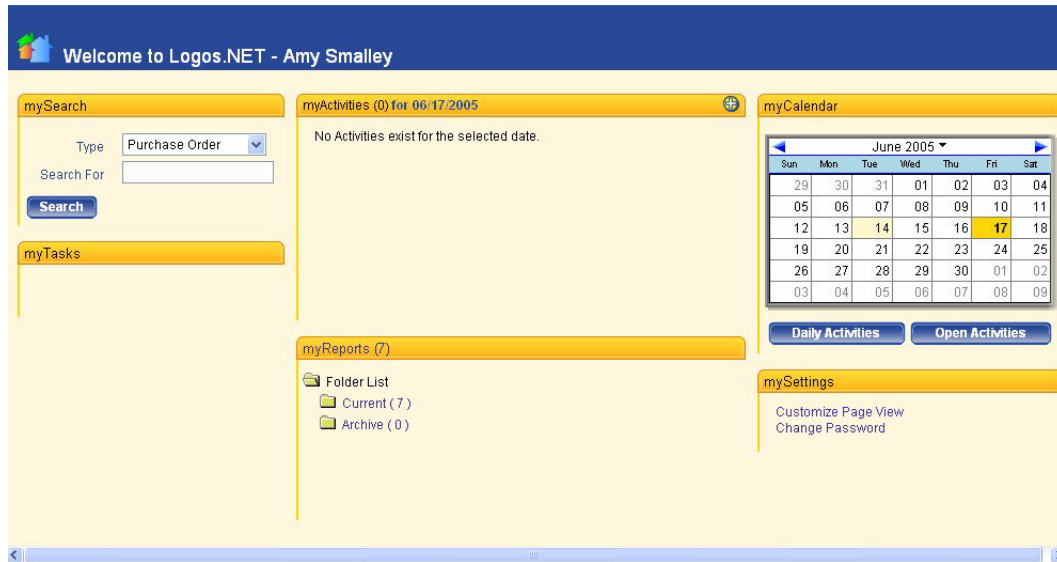
Use this procedure to load saved settings for the selected report.

- 1** From the **Human Resources > State Requirements > MN > [Report Name]** menu, select the report for which you want to load a saved report. The report page displays.
- 2** Select the name of the previously saved report template, from the *Load Saved Report* control.

The controls update to display the saved report settings.
- 3** Make the necessary changes to the template or submit the report to **myRe-ports**.

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.

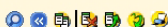


When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:



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:

Minnesota PERA Report
myReports



☐ Choose Printer

☐ Reports for Amy Smalley

☐ Current

☒ [Minnesota Quarterly Tax](#)

☐ Position Budget Report

☐ Budget Position Listing

☐ Open Position Report

☐ Archive

New World City
Minnesota Quarterly Tax And Wage Report

Social Security Number	Name	Gross Wages	Hours Worked
556-46-1999	Eric Scott Baker	6,444.16	106.00
999-26-3099	Curtis Bruch	8,610.36	50.00
999-66-9499	Jeanette Verbeeren	500.00	169.23
999-45-6899	Dorthea Cougill	0.00	6.15
999-44-5599	Todd Michael Jacobs	5,920.00	326.15
999-87-6699	Tamara Lerman	0.00	6.15
999-84-0799	Deborah Morris	0.00	6.15
999-69-6099	Steve B Myerscough	0.00	0.00
999-06-1799	Deborah Wiazowska	0.00	15.38
999-46-3699	Richard Sims	0.00	15.38
999-24-5599	John Wiazowski	0.00	2.00
999-27-4099	Caryll Distefano	0.00	6.15
999-25-5999	Brian Applegate	0.00	9.23
999-08-9399	Diane Jones	0.00	9.23
999-80-6399	Corinne Ratliff	0.00	3.08
999-26-0299	Kendra Russell	0.00	12.31
999-85-6299	Jeffrey Sager	0.00	15.38
999-05-5899	Charles Finley	0.00	9.23
999-08-9490	Mary Allen	231.84	28.00
999-66-9799	Jennifer Andrews	168.72	24.00
999-82-9199	Wanda Snider	56.00	8.00
999-62-4799	Nancy Snider	918.48	43.00
999-83-1399	Edith Snider	61.52	8.00
999-63-6199	John A Snider	0.00	200.00

To print the report, click the **Print** button.

