Logos®.NET

Public Administration Software

New York State Requirements

User Guide

New World Systems®

The Public Sector Software Company

Reports 1-1

Procedures 2-1

1

REPORTS

Overview

This chapter provides detailed window and field information for New York 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.newyork.gov
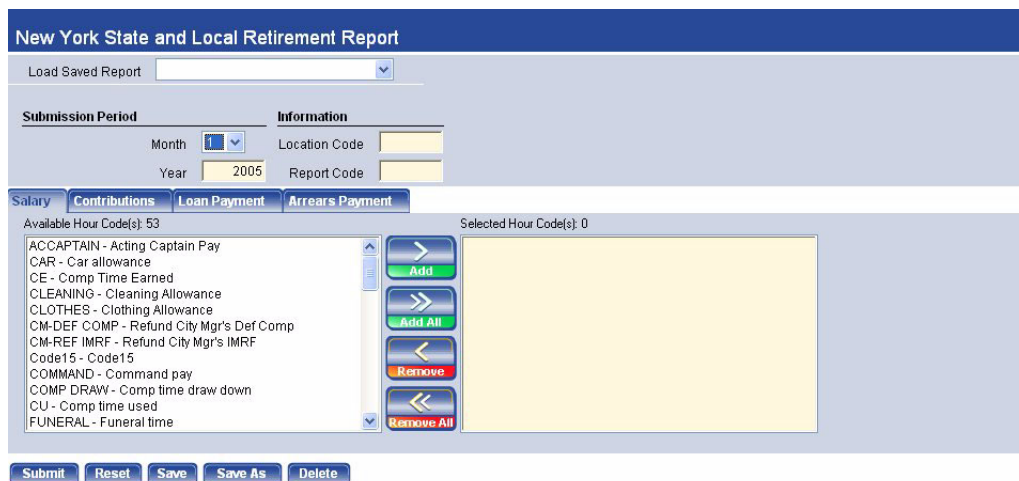
✎ NOTE:

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

1 "New York State and Local Retirement Report" on page 1-2 enables authorized users to select the information that appears on the New York Retirement Report and submit it to **myReports**.

2 "New York Quarterly Wage Report" on page 1-8 enables authorized users to select the information that appears on the New York Quarterly Wage Report and submit it to **myReports**.

New York State and Local Retirement Report

The "New York State and Local Retirement Report," accessed from the Human Resources menu (**Human Resources > State Requirements > NY > State and Local Retirement Report**), enables authorized users to select the information that appears on the New York State and Local Retirement Report and submit it to **myReports**. For a description of the procedures that can be performed on this page, please refer to Chapter 2, "Procedures."

Entry Control Descriptions

Table 1.1   "New York State and Local Retirement 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>.
Submission Period	This section groups submission period information for the report.
Month	Enter the month for which the report should be run. The number for the current month (e.g., 1 = January, 6 = June, etc.) is the default value.
Year	This control is required. Enter the year for which the report should be run. The current year is the default value.
Information	This section groups the location and report information controls.
Location Code	This control is required. Enter the location code. It may contain up to five characters.
Report Code	This control is required. Enter the report code. It may contain up to three characters.

Salary Tab

As the default visible tab of the "New York State and Local Retirement Report" page, the "Salary" tab enables users to specify the hours codes for to include on the report. This tab is shown as the default under "New York State and Local Retirement Report" on page 1-2.

Salary Tab Entry Control Descriptions

Table 1.2 "New York State and Local Retirement Report" Salary Tab Controls

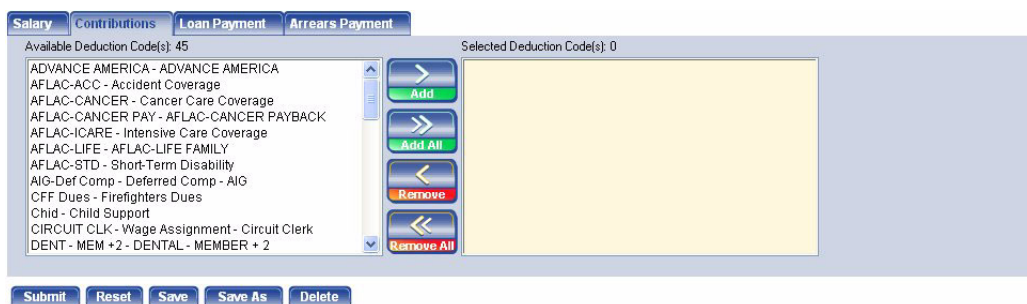| Control	Description
Available Hour Codes	This control displays all hour codes to which the user has authority. Users may use Ctrl+Click to select multiple hour codes or Shift+Click to select a range of hour codes.
Selected Hour Codes	This control displays all hour codes that have been selected to include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

Salary Tab Command Buttons

Table 1.3 "New York State and Local Retirement Report" Salary Tab Command Buttons

Button	Description
Add	This button moves all selected hour codes in the *Available Hour Codes* multi-select textbox to the *Selected Hour Codes* multi-select textbox. If no hour codes are listed in the *Available Hour Codes* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all hour codes from the *Available Hour Codes* multi-select textbox to the *Selected Hour Codes* multi-select textbox. If no hour codes are listed in the *Available Hour Codes* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected hour codes from the *Selected Hour Codes* multi-select textbox to the *Available Hour Codes* multi-select textbox. If no hour codes are listed in the *Selected Hour Codes* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all hour codes from the *Selected Hour Codes* multi-select textbox to the *Available Hour Codes* multi-select textbox. If no hour codes are listed in the *Selected Hour Codes* multi-select textbox, the **Remove All** command button is disabled.

Contributions Tab

As a tab of the "New York State and Local Retirement Report" page, the "Contributions" tab enables users to specify the deduction codes for contributions to include on the report.

Contributions Tab Entry Control Descriptions

Table 1.4 "New York State and Local Retirement Report" Contributions Tab Controls

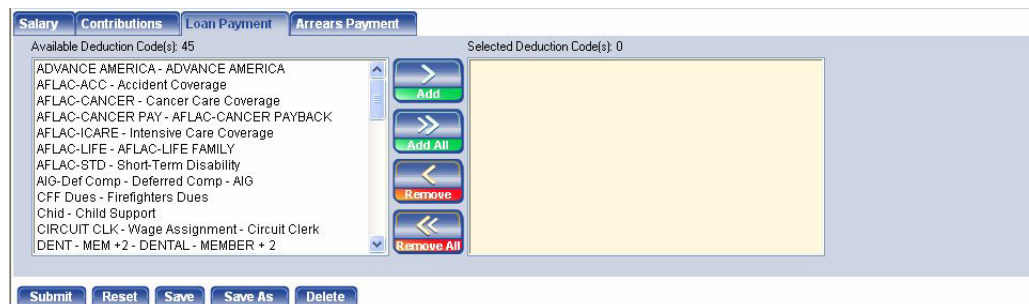| Control	Description
Available Deduction Codes	This control displays all deduction codes to which the user has authority. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.
Selected Deduction Codes	This control displays all deduction codes that have been selected to include on the listing. At least one deduction code must be selected from any of the three tabs with deduction codes. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.

Contributions Tab Command Buttons

Table 1.5 "New York State and Local Retirement Report" Contributions Tab Command Buttons

Button	Description
Add	This button moves all selected deduction codes in the *Available Deduction Codes* multi-select textbox to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all deduction codes from the *Available Deduction Codes* multi-select textbox to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected deduction codes from the *Selected Deduction Codes* multi-select textbox to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all deduction codes from the *Selected Deduction Codes* multi-select textbox to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove All** command button is disabled.

Loan Payment Tab

As a tab of the "New York State and Local Retirement Report" page, the "Loan Payment" tab enables users to specify the deduction codes for backfund contributions to include on the report.

Loan Payment Tab Entry Control Descriptions

Table 1.6   "New York State and Local Retirement Report" Loan Payment Tab Controls

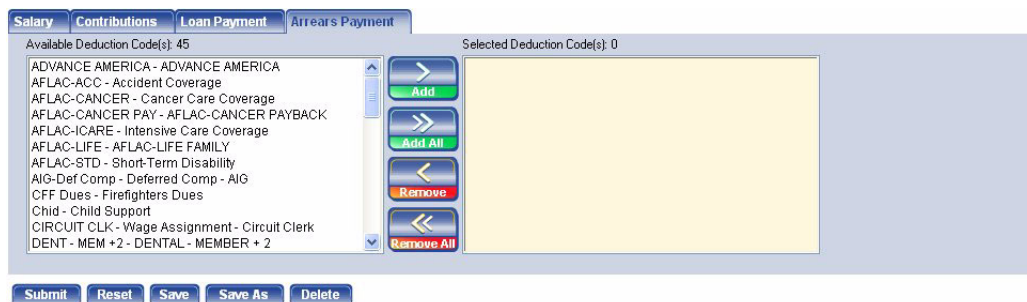| Control	Description
Available Deduction Codes	This control displays all deduction codes to which the user has authority. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.
Selected Deduction Codes	This control displays all deduction codes that have been selected to include on the listing. At least one deduction code must be selected from any of the three tabs with deduction codes. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.

Loan Payment Tab Command Buttons

Table 1.7   "New York State and Local Retirement Report" Loay Payment Tab Command Buttons

Button	Description
Add	This button moves all selected deduction codes in the *Available Deduction Codes* multi-select text-box to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all deduction codes from the *Available Deduction Codes* multi-select textbox to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected deduction codes from the *Selected Deduction Codes* multi-select text-box to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all deduction codes from the *Selected Deduction Codes* multi-select textbox to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove All** command button is disabled.

Arrears Payment Tab

As a tab of the "New York State and Local Retirement Report" page, the "Arrears Payment" tab enables users to specify the deduction codes for arrears payments to include on the report.

Arrears Payment Tab Entry Control Descriptions

Table 1.8   "New York State and Local Retirement Report" Arrears Payment Tab Controls

Control	Description
Available Deduction Codes	This control displays all deduction codes to which the user has authority. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.
Selected Deduction Codes	This control displays all deduction codes that have been selected to include on the listing. At least one deduction code must be selected from any of the three tabs with deduction codes. Users may use Ctrl+Click to select multiple deduction codes or Shift+Click to select a range of deduction codes.

Arrears Payment Tab Command Buttons

Table 1.9   "New York State and Local Retirement Report" Arrears Payment Tab Command Buttons

Button	Description
Add	This button moves all selected deduction codes in the *Available Deduction Codes* multi-select textbox to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add** command button is disabled.
Add All	This button moves all deduction codes from the *Available Deduction Codes* multi-select textbox to the *Selected Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Available Deduction Codes* multi-select textbox, the **Add All** command button is disabled.
Remove	This button moves all selected deduction codes from the *Selected Deduction Codes* multi-select textbox to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove** command button is disabled.
Remove All	This button moves all deduction codes from the *Selected Deduction Codes* multi-select textbox to the *Available Deduction Codes* multi-select textbox. If no deduction codes are listed in the *Selected Deduction Codes* multi-select textbox, the **Remove All** command button is disabled.

Command Buttons

Table 1.10 "New York State and Local Retirement Report" Command Buttons

Button	Description
Submit	This button automatically sends the "New York State and Local Retirement Report" to **myReports**. A Windows File Download dialog box will appear to give the user the option to open or save a text file version of the report.
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 *Month* 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 *Month* control. This button is hidden if the user does not have the appropriate security permissions.

Table 1.10 "New York State and Local Retirement 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 **OK** is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the *Month* control. This button is hidden if the user does not have the appropriate security permissions.
Delete	Enabled only if the *Load Saved Report* 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 *Month* control. This button is hidden if the user does not have the appropriate security permissions.

Report Output

Generated via the "New York State and Local Retirement Report" page, the report provides users with information detailing retirement information for employees. Data on the report includes all employees for the date range selected. A sample report appears below.

Report Fields

Table 1.11 "New York State and Local Retirement Report" Fields

Column	Description
Registration Number	This column displays the employer's registration number.
SSN	This column displays the Social Security Number of the employee.
Control Initial	This column displays the control initial used for this employee.
Last Name	This column displays the employee's last name.
First Name	This column displays the employee's first name.
Days of Service	This column displays the employee's days of service within the submission period.
Gross Salary	This column displays the employee's gross salary within the submission period.
Contributions	This column displays the amount of contributions made within the submission period.
Loan Payment	This column displays the amount of loan payments made within the submission period.
Arrears Payment	This column displays the amount of arrears payments made within the submission period.
Department Number	This column displays the number of the department to which the employee belongs.

New York Quarterly Wage Report

The "New York Quarterly Wage Report"page, accessed from the Human Resources menu (**Human Resources > State Requirements > NY > Quarterly Wage Report**), enables authorized users to select the information that appears on the New York Quarterly Wage Report and submit it to **myReports**. For a description of the procedures that can be performed on this page, please refer to Chapter 2, "Procedures."

Entry Control Descriptions

Table 1.12 "New York Quarterly Wage Report" Controls

Control	Description
Submission Period	This section groups submission period information for the report.
Quarter	This control is required. Select the quarter for which you want to run the report. The available options are 1-4. The default selection is 1.
Year	This control is required. 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.
Original/Amended	This control indicates whether the original or amended information should appear on the report. Original is the defaul value.

Command Buttons

Table 1.13 "New York Quarterly Wage Report" Command Buttons

Button	Description
Submit	This button automatically sends the "New York Quarterly Wage Report" to **myReports**. A Windows File Download dialog box will appear to give the user the option to open or save a text file version of the report.
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.

Report Output

Generated via the "New York Quarterly 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 New York Quarterly Wage Report. Data on the report is sorted by *Social Security Number*. A sample report appears below.

New World Systems
New York Quarterly Tax and Wage Report
From Date: 10/01/2004 - To Date: 12/31/2004

Member Name	SSN	YTD State Tax Gross Amount	Quarterly State Tax Gross Amount	YTD State and Local Tax
Baker , Douglas	939-19-6455	$31,959.87	$8,135.55	$901.01
Pamperin , Brian	939-54-4044	$39,416.16	$10,284.19	$1,124.59
Bower , Joe	939-14-3200	$330.00	$120.00	$9.90
Brading , Ann	949-38-7600	$352.00	$176.00	$2.97
Brownson , Curtis	939-30-6211	$61,619.27	$17,187.87	$1,848.51
Buescher , Jeanette	939-94-6633	$31,342.65	$7,572.54	$884.76
Combs , Roscoe	939-22-3444	$9,435.50	$1,878.10	$2,158.10
Cougill , Dustha	939-68-5499	$31,483.60	$6,951.40	$944.52
Goddard , Janice	949-88-6200	$110.00	$0.00	$3.30
Grewell , Gary	939-06-3400	$198.00	$0.00	$0.00
Gueldner , John	939-30-6277	$195.00	$0.00	$0.00
Inyart , Timothy	939-45-6077	$198.00	$0.00	$0.00
Jacobs , Todd	939-86-6833	$36,509.12	$8,976.66	$1,095.30
Kibler , Marjorie	939-18-2866	$5,192.37	$1,346.17	$97.93
Knoop , Ronnie	939-45-1666	$180.00	$0.00	$0.00
Lanman , Tamara	939-66-7855	$51,775.27	$12,770.31	$1,553.31
Moshtagh , Deborah	939-07-4822	$34,697.43	$9,400.38	$1,040.97
Muller , Brian	939-68-5488	$176.00	$0.00	$0.00
Myerscough , Steve	949-60-9688	$220.00	$0.00	$6.60
Pamperin , Deborah	939-17-6066	$30,627.60	$7,961.82	$918.85
Pittman , Larry	939-36-4077	$1,177.74	$437.58	$35.37
Rennels , Lorelei	939-55-6200	$2,602.34	$1,212.76	$38.74
Sims , Richard	939-36-6411	$80,091.94	$21,168.67	$2,290.24
Smith , John	939-35-3211	$1,710.32	$587.52	$0.00

Report Fields

Table 1.14 "New York Quarterly Wage Report" Fields

Column	Description
Member Name	This column displays the employee's full name.
SSN	This column displays the employee's Social Security Number.
YTD State Gross Amount	This column displays the employee's year-to-date gross salary for this quarter on which taxes will be based.
Quarterly State Tax Gross Amount	This column displays the gross amount of the employee's state taxes that will be withheld for this quarter.
YTD State and Local Tax	This column displays the amount of state and local taxes the employee has paid so far this quarter.

2

PROCEDURES

Overview

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

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

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

Saving Report Settings

Use this procedure to save report settings for future use.

1 From the **Human Resources** > **State Requirements > NY >** [Report Name] menu, select the report for which you want to save report settings. The report page displays.

2 Complete the controls for the report you selected as detailed in Chapter 1, "Reports."

3 Click the **Save** button to automatically save changes to an existing report template.

-OR-

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

Please enter a new report criteria name

OK   Cancel

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** > **NY** > [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 **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.
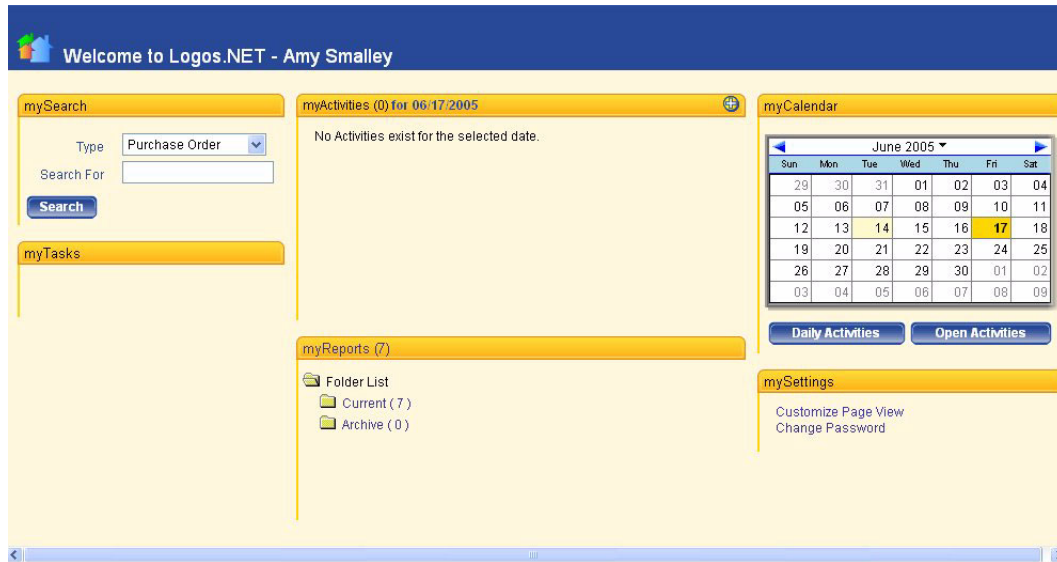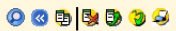
When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:
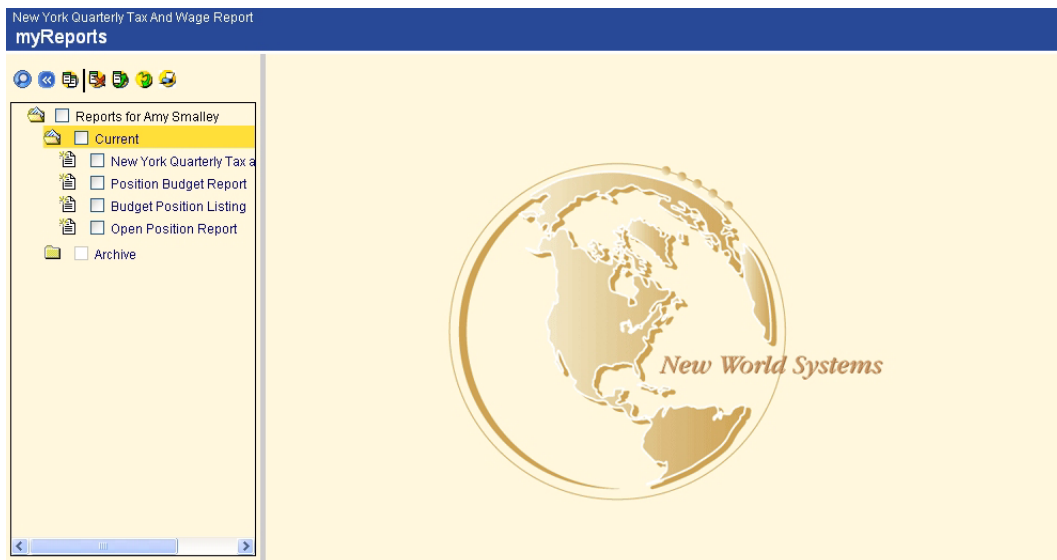
The report name is hyperlinked. Click on the name of the report you want to see, and the results will display on the right-hand side of the page:

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