Logos®.NET

Public Administration Software

North Carolina State Requirements

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Training/User Guide

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New World Systems®
The Public Sector Software Company

Overview

This manual provides instructions for the set up and use of the North Carolina State Requirements reports:

North Carolina State Requirements

The "North Carolina Retirement Systems Report" requires the setup of user-defined employee fields in *Maintenance*. These fields accommodate employee retirement contributions made in the form of payroll deductions.

Set up Section Header and Employee User-Defined Fields

One section header, two user-defined validation-set fields, four user-defined date/time fields and two user-defined text fields need to be set up for the "North Carolina Retirement Systems Report." The user-defined fields will be grouped under the section header on the "Employee User-Defined" page in *Employee Maintenance*:

Section Header

- **NC Orbit**

Validation-Set Fields

- *Orbit Job Classification*
- *Orbit Plan Code*

Date/Time Fields

- *Orbit Plan Code Effective Date*
- *Orbit Eligible Date*
- *Contract Period Begin Date*
- *Contract Period End Date*

Text Field

- *Orbit Member ID*
- *Contract Period*

Section Header Setup

To set up the **NC Orbit** section header that will group all of the user-defined fields, follow these steps:

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

2 Select *Employee* from the *Record Type* dropdown.

3 Select *Section Headers* from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined employee section headers:
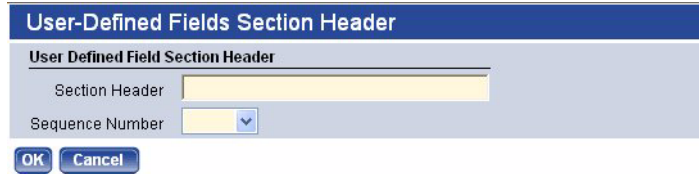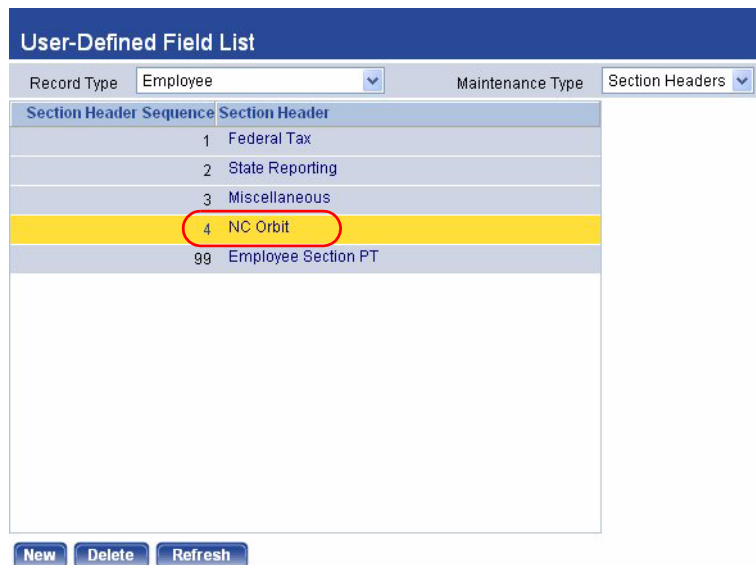

4 Click [New]. The "User-Defined Fields Section Header" popup will open:

5 For *Section Header*, type **NC Orbit**. (The user-defined fields that you will create for the "North Carolina Retirement Systems Report" will be grouped under this header on the "Employee User-Defined" page in *Employee Maintenance*.)

6 Use the *Sequence Number* field to tell where you want the **NC Orbit** section to appear in relation to other sections on the "Employee User-Defined" page; for example, if the page already contains sections 1 through 3), and you want the **NC Orbit** section to appear below section 3, select 4 from the dropdown. If you want the section to appear somewhere in between, you will need to change the sequence numbers of the other sections accordingly. If you want the section always to appear at the top of the page, select 1; if you want it always to at the bottom of the page, select 99.

7 Click [OK]. The popup will be closed, and the grid on "User-Defined Field List" page will be refreshed to show the newly added **NC Orbit** *Section Header*:

Validation-Set Fields Setup

To set up the validation-set fields that will be part of the **NC Orbit** section on the "Employee User-Defined" page in *Employee Maintenance*, follow these steps:

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

2 Select *Employee* from the *Record Type* dropdown.

3 Select *Attributes* from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined employee fields and, where applicable, their associated section headers:

4 Click [New]. The "User-Defined Fields" popup will open:

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

Field	Value
Name	***Orbit Plan Code***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Validation Set***
Maximum Length	(Selecting ***Validation Set*** as the *Data Type* will replace this field with a *Validation Set* field.)
Validation Set	***Orbit Plan Code***
Required	(Leave this check box unchecked.)

6 Click **OK**

Repeat steps four through six for the second validation-set field that needs to be set up. The following table contains the entries you will need to make:

Field	Value
Name	***Orbit Job Classification***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Validation Set***
Validation Set	***Orbit Job Classification***
Required	(Leave this check box unchecked.)

Date/Time Fields Setup

To set up the date/time fields that will be part of the **NC Orbit** section on the "Employee User-Defined" page in *Employee Maintenance*, repeat steps four through six, completing the fields **exactly** as shown in the following tables:

Field	Value
Name	***Orbit Plan Code Effective Date***
Section Header	***NC Orbit***

Field	Value
Sequence Number	(Leave this field blank.)
Data Type	***Date/Time***
Validation Set	(Selecting ***Date/Time*** as the *Data Type* will hide this control.)
Required	(Leave this check box unchecked.)

Field	Value
Name	***Orbit Eligible Date***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Date/Time***
Validation Set	(Selecting ***Date/Time*** as the *Data Type* will hide this control.)
Required	(Leave this check box unchecked.)

Field	Value
Name	***Contract Period Begin Date***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Date/Time***
Validation Set	(Selecting ***Date/Time*** as the *Data Type* will hide this control.)
Required	(Leave this check box unchecked.)

Field	Value
Name	***Contract Period End Date***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)

Field	Value
Data Type	***Date/Time***
Validation Set	(Selecting ***Date/Time*** as the *Data Type* will hide this control.)
Required	(Leave this check box unchecked.)

Text Field Setup

To set up the text fields that will be part of the **NC Orbit** section on the "Employee User-Defined" page in *Employee Maintenance*, repeat steps four through six, completing the fields **exactly** as shown in the following tables:

Field	Value
Name	***Orbit Member ID***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Text***
Validation Set	(Selecting ***Text*** as the *Data Type* will replace this control with a *Maximum Length* control.)
Maximum Length	***9***
Required	(Leave this check box unchecked.)

Field	Value
Name	***Contract Period***
Section Header	***NC Orbit***
Sequence Number	(Leave this field blank.)
Data Type	***Text***
Validation Set	(Selecting ***Text*** as the *Data Type* will replace this control with a *Maximum Length* control.)
Maximum Length	***2***
Required	(Leave this check box unchecked.)

When you are finished, the grid on the "User-Defined Field List" page should contain a row for each user-defined field you have saved as part of the **NC Orbit** section:

Set up Section Header and Hours Code User-Defined Check Box and Field

One section header and one user-defined hours code check box and field need to be set up for the "North Carolina Retirement Systems Report." The user-defined check box and field will be grouped under the section header on the Hours Code User-Defined Fields page in *Earnings Maintenance*:

Section Header

> NC Orbit

Check Box

- *Orbit Retiree Excluded Wages*

Field

- *Orbit Pay Type*

Hours Code Section Header Setup

To set up the section header for the user-defined hours code check box and field on the Hours Code User-Defined Fields page in *Earnings Maintenance*, follow these steps:

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

2 Select *Hours Code* 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 hours code section headers.

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

5 For *Section Header*, type **NC Orbit**. (The user-defined check box that you will create for the "North Carolina Retirement Systems Report" will be placed under this header on the Hours Code User-Defined Fields page in *Earnings Maintenance*.)

6 Use the *Sequence Number* field to tell where you want the **NC Orbit** section to appear in relation to other sections on the Hours Code User-Defined Fields page in *Earnings Maintenance*; for example, if the Hours Code User-Defined Fields page already contains three sections (sequence numbers 1 through 3), and you want the **INC Orbit** section to appear below those sections, select *4* from the drop-down. If you want the section to appear somewhere in between, you will need to change the sequence numbers of the other sections accordingly. If you want the section always to appear at the top of the page, select *1*; if you want it always to at the bottom of the page, select *99*.

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

Hours Code Check Box and Field Setup

To set up the user-defined check box that will be part of the **NC Orbit** section on the Hours Code User-Defined Fields page in *Earnings Maintenance*, follow these steps:

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

2 Select *Hours Code* 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 deduction fields.

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

5 Complete the fields *exactly* as follows:

Field	Value
Name	***Orbit Retiree Excluded Wages***
Section Header	***NC Orbit***
Sequence Number	(Your choice or leave blank.)
Data Type	***Check Box***
Maximum Length	(Selecting a *Data Type* of ***Check Box*** will hide this field.)
Required	(Selecting a *Data Type* of ***Check Box*** will hide this field.)

When an employee with a plan code of LOCRS (Retirees) is paid an hours code that has *Orbit Retiree Excluded Wages* checked, those wages will be excluded from the report. All other hours code wages will be included.

6 Click **OK** to save the entries.

Repeat steps four through six for the hours code field that needs to be set up. The following table contains the entries you will need to make:

Field	Value
Name	***Orbit Pay Type***
Section Header	***NC Orbit***
Sequence Number	(Your choice or leave blank.)
Data Type	***Text***
Maximum Length	***8***
Required	(Leave this check box unchecked.)

Use this field to create individual wage records for different hours codes according to the pay code types associated with them.

When you are finished, the *Hours Code Attributes* grid on the User-Defined Field List page should contain two additional rows, one for the check box and one for the field you have saved as part of the **NC Orbit** section on the Hours Code User-Defined Fields page in *Earnings Maintenance*.

Set up Validation-Set Values

To comply with the formatting requirements of the state transmittal file, entries (values) in the *Orbit Plan Code* and *Orbit Job Classification* fields must be expressed precisely; therefore, the validation sets for these fields must have values set up for use by the "North Carolina Retirement Systems Report."

Plan Code Values Setup

To set up the validation-set values you will use for the *Orbit Plan Code* field, follow these steps:

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

2   Highlight the validation set, *Orbit Plan Code*:

3   Click [Values]. The "Validation Set Values List" page for *Orbit Plan Code* will open.

4   Click [New]. The "Validation Set Value" page will open:

5 In the *Value* field, type the following, <u>exactly</u> as shown below:

JUD1

6 In the *Description* field, type ***Consolidated Judicial System-Justices of the Supreme Court and Judges of the Court of Appeals***, or any entry that makes it easy for you to identify the *Value*. This entry is not required to comply with a predetermined wording.

> ## 🗒 NOTE:
>
> *The transmittal file will use the **Value** to identify the plan code information being sent to the state; therefore, take care to enter each **Value** exactly as shown in these instructions.*

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*.

8 Repeat steps five through seven for the remaining validation-set values that need to be set up, clicking [Save] after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
JUD2	Consolidated Judicial System-Judges of the Superior Court and Administrator Officer of the Courts
JUD3	Consolidated Judicial System-Judges of the District Court, District Attorney, Clerk of Superior Court
LEGL	Legislative Retirement System Legislators
LOCF	Local Governmental Employees System Firemen Class
LOCG	Local Governmental Employees System General Class
LOCL	Local Governmental Employees System Law Enforcement Class
LOCMAX	Local Governmental Employees System earnings for employees who have exceeded the Internal Revenue Service limit for reportable earnings and contributions within a calendar year

Value	Description
LOCROD	Local Governmental Employees System Register of Deeds Class
LOCRS	Rehired Retirees Subject to Earnings Limitations. **📋 NOTE:** *When an employee with a plan code of LOCRS (Retirees) is paid an hours code that has Orbit Retiree Excluded Wages checked, those wages will be excluded from the report. All other hours code wages will be included.*
LOCWP	Local Governmental Employees System probationary employees under an employer-imposed waiting period
ORPG	Optional Retirement Program for Applicable University and Community College Personnel
ORPMAX	Optional Retirement Program Earnings for the employees who have exceeded the Internal Revenue Service limit for reportable earnings and contributions within a calendar year
STDIS	Teachers and State Employees on Short-Term Disability
STG	Teachers and State Employees General Class
STL	Teachers and State Employees Law Enforcement Class
STMAX	Teachers and State Employees earnings for employees who have exceeded the Internal Revenue Service limit for reportable earnings and contributions within a calendar year
STRE	Teachers and State Employees System Retiree who are rehired and are exempt from an earnings limitation
STRS	Teachers and State Employees System Retirees who are rehired and subject to an earnings limitation

9 When you are finished, the grid on the "Validation Set Values List" page for *Orbit Plan Code* should contain a row for each value you have saved:

Job Classification Values Setup

To set up the validation-set values that you will use for the *Orbit Job Classification* field, follow these steps:

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

2 Highlight the validation set, *Orbit Job Classification*.

3 Click **Values**. The "Validation Set Values List" page for *Orbit Job Classification* will open.

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

5 In the *Value* field, type the following, <u>exactly</u> as shown below:

100

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

✎ NOTE:

*The transmittal file will use the **Value** to identify the job classification information being sent to the state; therefore, take care to enter each **Value** exactly as shown in these instructions.*

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.

8   Repeat steps five through seven for the remaining validation-set values that need to be set up, clicking ⟦Save⟧ after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
102	Educational Executives
103	Educational Management
104	Educational Administrative Support Personnel
105	Educational Support Personnel
200	Professionals
201	Government Officials and Executives
202	Administrative
203	Technical and Trades
204	Skilled Labor
300	University and Community College Professionals
301	University and Community College Executives
302	University and Community College Management
303	University Agricultural (AG) Extension
400	Firefighters
401	Emergency Workers
500	SHP Trooper
501	Police Officer
502	Public Safety Officer
503	Sheriff
504	Deputy Sheriff
505	Wildlife Officer
506	Revenue Enforcement Officer
507	ALE Officer
508	Jailer (Certified)
509	Protective Services (Non-Certified)
600	Health Care Professionals
601	Social Service Professionals

9 When you are finished, the grid on the "Validation Set Values List" page for *Orbit Job Classification* should contain a row for each value you have saved:

Set up Employee for Retirement System Reporting

To set up an employee for retirement system reporting, follow these steps:

1 Navigate to **Human Resources > Employee Maintenance**. The "Employee List" page will open.

2 Use the search controls to produce a list of employees.

3 Click the *Employee Number* link for the employee you want to set up for retirement system reporting. The "Employee" page will open.

4 From the *Attribute* dropdown, select **User Defined**. The page will be refreshed to show existing user-defined fields, including an **NC Orbit** section containing the validation, date and text fields you set up earlier:

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5 Under the **NC Orbit** section header, make selections in the appropriate fields. Any employee who has a selection in at least one of these controls is eligible to appear on the "North Carolina Retirement Systems Report."

The following table describes the purpose of each field:

Field	Description
Contract Period	Unique code identifying the member's contract period for the detail transaction: *08* = Eight Month Contract, *09* = Nine Month Contract, *10* = Ten Month Contract, *11* = Eleven Month Contract, *12* = Twelve Month Contract. This entry enables RSD to determine how to award service credit accurately and perform average salary calculations for retirement applications.
Contract Period Begin Date	Time period during which a member may begin to earn creditable retirement service. This field is for Educational Institution use.
Contract Period End Date	

Field	Description
Orbit Eligible Date	Date the employee becomes eligible to participate in the state retirement program. Use this field if a waiting period is required before eligibility. If the employee already is eligible, leave this field blank. **Note: if you select a future date of eligibility, do not assign Orbit deductions to the employee until that time.**
Orbit Job Classification	Employee's type of work. This information will be defaulted when you create the retirement systems data that will be reported to the state and, if necessary, may be changed at that time.
Orbit Plan Code	Employee's retirement plan code. This information will be defaulted when you create the retirement systems data that will be reported to the state and, if necessary, may be changed at that time.
Orbit Plan Code Effective Date	Date the selected *Orbit Plan Code* becomes effective for the employee.
Orbit Member ID	State-assigned number identifying the employee as a member of retirement program. The first time you enter NC Orbit information for an employee, leave the *Orbit Member ID* field blank. When the state receives your first transmittal file, it will issue the ID to be used for subsequent contribution reports. This ID will remain with the employee throughout his or her employment with the state.

6   After making your selections, click [Save] to save them.

7   Repeat these steps for each employee who will be included in the retirement systems report.

> ### 📋 NOTE:
>
> *If you select a future* **Orbit Eligible Date***, do not assign Orbit deductions to the employee until eligibility begins.*

Set up Hours Codes for Retirement System Reporting

The *Orbit Retiree Excluded Wages* check box is used to exclude hours that are paid but not reportable. Contributions for employees set up to have these hours excluded will be zero.

The *Orbit Pay Type* field is used to create individual wage records for different hours codes according to the pay code types associated with them.

To set up an hours code for NC Orbit reporting, follow these steps:

1 Navigate to **Maintenance > Human Resources** > **Earnings Maintenance** > **Hours Codes**. The Hours Codes List page will open.

2 Highlight an hours code.

3 Click the **User-Defined Fields** button. The Hours Code User Defined Fields page for the selected hours code will open.

4 Under the **NC Orbit** header, check the *Orbit Retiree Excluded Wages* box.

5 In the *Orbit Pay Type* field, fill in the pay code type to be associated with the hours code. Valid pay type codes are as follows:
REG
TERMPAY
ANNLONG
ANNLEAVE
OVERTIME
WORKCOMP
LEAVEPAY
BONUS

NOTE:

If an hours code does not use the **Orbit Pay Type** *UDF, a pay type code of* **REG** *will be the default; consequently, you need only make UDF entries for hours codes that do not fall under the* **REG** *pay type code.*
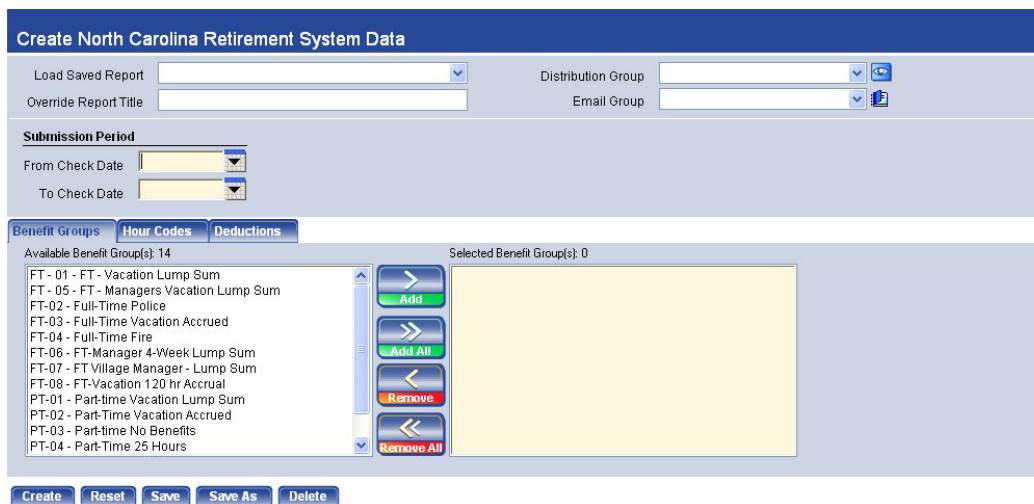
6 Click **Save**.

7 Repeat these steps for all appropriate hours codes.

Create Retirement System Data

Once you have set up the necessary user-defined fields, you will be ready to create an on-screen work file of retirement system data that will be available for the "North Carolina Retirement Systems Report." This data will cover as many benefit groups as you select and 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 > NC > Create Retirement System Data**:

2 Make entries in the appropriate fields. The following table describes each field:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click ![Save], a popup will ask you to name the report. Type the name, and click ![OK]. The next time you want to run this report, select its name from the *Load Saved Report* drop-down, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title ("North Carolina Retirement System Report") of the report.

Field	Description
Distribution Group	A group of people selected to receive the report in *myReports*. Click the dropdown prompt ⌄ to select the group, or click the blue-eye prompt ◉ to create a new distribution group. The report will be sent to *myReports* for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your *Human Resources User Guide*.)
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt ⌄ to select the group. To create a new e-mail group, click 📕.
From Check Date	Required. Reporting period start date. Information for the entire pay period covered by this check date will be included in the work file. If multiple pay periods are reported in one batch, this date should match the earliest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/01/2007**.
To Check Date	Required. Reporting period end date. Information for the entire pay period covered by this check date will be included in the work file. If multiple pay periods are reported in one batch, this date should match the latest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/31/2007**.

3 Click the **Benefit Groups** tab.

4 Select one or more benefit groups from the *Available Benefit Group(s)* list box. Employees associated with these benefit groups will be included in the report.

- To select multiple benefit groups dispersed throughout the list, hold down the **<Ctrl>** key while selecting.

- To select multiple, consecutive benefit groups, hold down the **<Shift>** key, and select the first benefit group, then the last.

- Select at least one benefit group.

5 Click [>Add] to move the selected benefit group(s) from the *Available Benefit Group(s)* box to the *Selected Benefit Group(s)* box.

- [>>Add All] moves all benefit groups, selected or not, to the *Selected Benefit Group(s)* box.

- [<Remove] returns the selected benefit groups to the *Available Benefit Group(s)* box.

- [<<Remove All] returns all benefit groups to the *Available Benefit Group(s)* box.

6 Click the **Hour Codes** tab.

7 From the *Available Hour Code(s)* box, select one or more hour codes that are subject to retirement contributions. (For instructions on how to make selections, see steps 4 and 5.)

8 Click the **Deductions** tab.

9 From the *Available Deduction Code(s)* box, select one or more of the deduction codes that will be reported to the state. Employees with these deductions for the pay period selected will be included in the report. (For instructions on how to make selections, see steps 4 and 5.)

10 After making your entries, click [Create].

11 A message will be displayed, telling you the previously created work file will be cleared and asking whether you want to continue. If you do, click <u>Accept</u>. The current retirement system data will populate the work file, and the "North Carolina Retirement System List" page will open (see next section).

North Carolina Retirement System List

The "North Carolina Retirement System List" page lets you review and modify retirement system data for each employee and employee pay period that match the selections made on the "Create Retirement System Data" page (see previous section). After you create the data, this page is opened automatically. You also may open this page by going to **Human Resources > State Requirements > NC > Retirement System List**:

Data is listed in a two-level results grid, sorted alphabetically by employee. For each employee, the first level of the grid displays member, employment, overall pay and plan information. The second level displays individual pay period information. The number of rows, or records, that appear on this level will be equal to the number of pay periods that fall within the check dates selected on the "Create North Carolina Retirement System Data" page. To view the second level, click the plus sign ⊞ next to an employee name.

If an employee's plan code changed within the check date range selected on the "Create North Carolina Retirement System Data" page, a green check mark ✓ will be displayed in the *Plan Code Change* column. If the employee's deduction was adjusted within the same period, the same check mark will be displayed in the *Adjusted Deduction* column.

If you want to search the list for a particular employee, select the employee's name in the *Employee* control, and click [Search]. The grid will be refreshed to include that employee only. To change the grid to include all employees, clear the *Employee* control, and click [Search].

Add and Edit Member Information

1 If you need to add an employee to the "North Carolina Retirement System List" for the time period being reported, click [New Employee]. The "North Carolina Retirement System Entry" popup will open in Add mode:

2 Make entries in the appropriate fields:

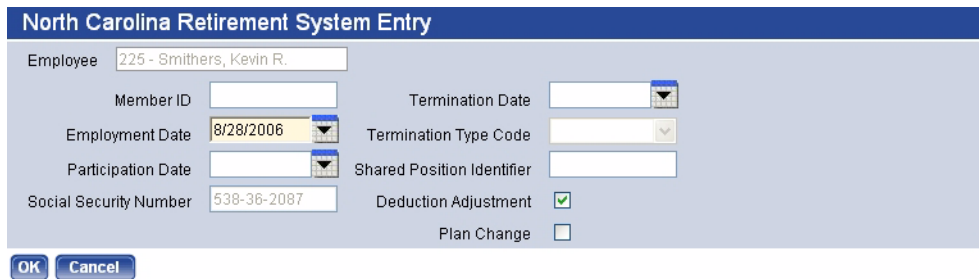| Field	Description
Employee	Name of the retirement-plan participant.
Orbit Member ID	State-assigned number identifying the retirement-plan participant. This entry will be defaulted from the *Orbit Member ID* field on the "Employee User-Defined" page in *Employee Maintenance*. Every employee who participates in the retirement plan will by tracked by this ID.
Employment Date	Date employment began. This entry is defaulted from the *Hire Date* field on the "Employee Personal" page in *Employee Maintenance*.
Participation Date	Date employee is eligible to participate in the retirement program. This entry will be defaulted from the *Orbit Eligible Date* field on the "Employee User-Defined" page in *Employee Maintenance*. **Note: employees with a *Participation Date* later than the pay end date will have zero dollars recorded for salary and contributions. Orbit deductions should not be assigned until participation begins.**
Social Security Number	Social security number of the employee. This number must match the number shown on the employee's social security card.

Field	Description
Termination Date	Employee's last day of work for the employer. This entry, defaulted from the *Termination Date* field on the "Employee Personal" page in *Employee Maintenance*, must be accompanied by a *Termination Type Code*.
Termination Type Code	Reason employment was ended. This entry, defaulted from the *Status Reason* field on the "Employee Personal" page in *Employee Maintenance*, must be accompanied by a *Termination Date*. Click the dropdown prompt ⌄ to select from the following codes: RETIRE DEATH **VOL** (voluntarily left employment) **INVOL** (involuntarily left employment)
Shared Position Identifier	Identifies position when multiple employees share one position. This identifier is used to calculate service correctly for each employee sharing a position.
Deduction Adjustment	Identifies a deduction discrepancy. If an employee's retirement contribution percentage in the work file turns out to be different from the percentage set up for the applicable deduction code, this box will be checked automatically, and a green check mark ✓ will be placed in the *Adjusted Deduction* column of the results grid. If you determine the percentage is correct, uncheck the box.
Plan Change	Identifies a change to an employee's retirement plan. If the user-defined *Orbit Plan Code Effective Date* falls within the reporting period covered in the work file, this box will be checked automatically when the file is created, and a green check mark ✓ will be placed in the *Plan Code Change* column of the results grid to alert you that a plan change has occurred and the salary and contribution dollars need to be reviewed for accuracy.

Field	Description
Pay Period Begin Date	Start date of the pay period being reported. This date comes from the pay batch. If multiple pay batches fall within this date and the *Pay Period End Date*, select the start date of the first pay batch.
Pay Period End Date	End date of the pay period being reported. This date comes from the pay batch. If multiple pay batches fall within this date and the *Pay Period End Date*, select the start date of the first pay batch.
Salary Amount	Wages from which contributions will be calculated.
Contributions	Total dollar amount of deductions for the pay period being reported.
Adjustment Code	Code indicating the transaction is an adjustment. Click the dropdown prompt to select **PRIOR** or **RETRO**. If you are reporting a prior-period (**PRIOR**) adjustment, the posting period must be prior to the current reporting period. The system will check whether the reported contribution is an adjustment to a previously submitted transaction. This type of adjustment also will explain negative contributions. If you are reporting a retroactive (**RETRO**) payment, the posting period must be prior to the current reporting period. The system will confirm that a contribution was not submitted in the previous reporting period.

Field	Description
Pay Type Code	Code representing the type of pay. Click the dropdown prompt ⌄ to select from the following codes: **REG** (regular contribution based on salary and contract salary) **TERMPAY** (terminal payout when a member's employment has been terminated, and the termination date has been reported) **BONUS** **ANNLONG** (annual longevity payment, reported annually or when a member's employment has been terminated) **ANNLEAVE** (lump-sum annual leave payment, reported only when a member's employment has been terminated, and the termination date has been reported) **OVERTIME** **WORKCOMP** **LEAVEPAY** (used to report $0.00 salary and $0.00 contributions when a member is on leave without pay and has not been terminated from employment) **SUMMERPAY** (non-contract payment outside of the normal contract period)
Vacation Hours Paid	Tells the number of vacation hours paid to the employee in a lump-sum payout when employment is terminated. This entry is required if a *Termination Date* has been entered. If vacation hours were not paid at termination, leave this field blank.
Plan Code	Employee's retirement plan code. This entry will be defaulted from the *Orbit Plan Code* selected on the employee's "Employee User-Defined" page in *Employee Maintenance*. If necessary, you may override this entry here.
Job Classification	Employee's type of work. This entry will be defaulted from the *Orbit Job Classification* selected on the employee's "Employee User-Defined" page in *Employee Maintenance*. If necessary, you may override this entry here.

If you need to edit data for a particular employee, click the hyperlinked *Employee Name*. The "North Carolina Retirement System Entry" popup will open in edit mode:
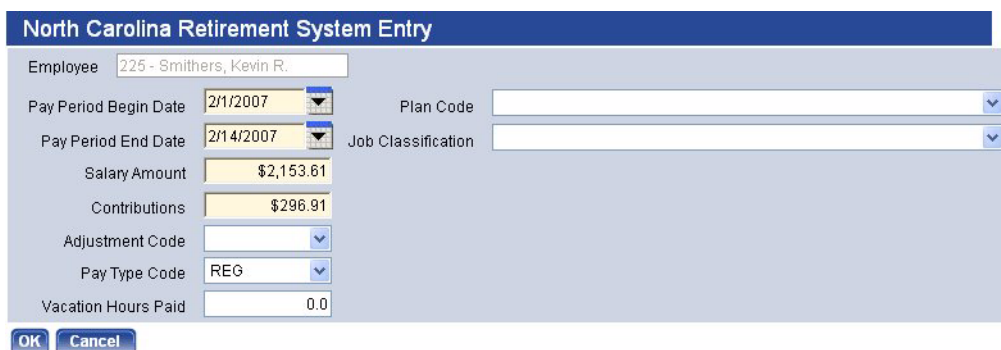

> ### ⟁ NOTE:
>
> *For descriptions of the fields on the edit popup, refer to the previous table.*

3 After making your entries, click [OK] to save them. The popup will be closed, and the grid on the "North Carolina Retirement System List" page will be updated with the new information. If you create a new employee record, a second row for the same employee will be displayed beneath the first.

Add and Edit Pay Period Information

1 If you need to add pay period information for a selected employee, click [New Pay Period]; if you want to edit information for a particular pay period, click the hyperlinked *Pay Period Begin* date. In both cases, the "North Carolina Retirement System Pay Period Entry" popup will open:

2 Make entries in the appropriate fields:

Field	Description
Employee	Name of the retirement-plan participant.
Pay Period Begin Date	Start date of the pay period being reported. This date comes from the pay batch. If multiple pay batches fall within this date and the *Pay Period End Date*, select the start date of the first pay batch.
Pay Period End Date	End date of the pay period being reported. This date comes from the pay batch. If multiple pay batches fall within this date and the *Pay Period End Date*, select the start date of the first pay batch.
Salary Amount	Employee's salary amount for the pay period being reported.
Contributions	Total dollar amount of deductions for the pay period being reported.
Adjustment Code	Code indicating the transaction is an adjustment. Click the dropdown prompt ⌄ to select **PRIOR** or **RETRO**.
	If you are reporting a prior-period (**PRIOR**) adjustment, the posting period must be prior to the current reporting period. The system will check whether the reported contribution is an adjustment to a previously submitted transaction. This type of adjustment also will explain negative contributions.
	If you are reporting a retroactive (**RETRO**) payment, the posting period must be prior to the current reporting period. The system will confirm that a contribution was not submitted in the previous reporting period.

Field	Description
Pay Type Code	Code representing the type of pay. Click the dropdown prompt ⌄ to select from the following codes:
	REG (regular contribution based on salary and contract salary)
	TERMPAY (terminal payout when a member's employment has been terminated, and the termination date has been reported)
	BONUS
	ANNLONG (annual longevity payment, reported annually or when a member's employment has been terminated)
	ANNLEAVE (lump-sum annual leave payment, reported only when a member's employment has been terminated, and the termination date has been reported)
	OVERTIME
	WORKCOMP
	LEAVEPAY (used to report $0.00 salary and $0.00 contributions when a member is on leave without pay and has not been terminated from employment)
	SUMMERPAY (non-contract payment outside of the normal contract period)
Vacation Hours Paid	Tells the number of vacation hours paid to the employee in a lump-sum payout when employment is terminated. This entry is required if a *Termination Date* has been entered. If vacation hours were not paid at termination, leave this field blank.
Plan Code	Employee's retirement plan code. This entry will be defaulted from the *Orbit Plan Code* selected on the employee's "Employee User-Defined" page in *Employee Maintenance*. If necessary, you may override this entry here.
Job Classification	Employee's type of work. This entry will be defaulted from the *Orbit Job Classification* selected on the employee's "Employee User-Defined" page in *Employee Maintenance*. If necessary, you may override this entry here.

3 After making your entries, click [OK] to save them. The popup will be closed, and the grid on the "North Carolina Retirement System List" page will be updated with the new information.

North Carolina Retirement System Report

After your work file has been created and reviewed for accuracy and completeness, the next step is to generate the "North Carolina Retirement System Report." The following steps show you how:

1 From the "North Carolina Retirement System List" page, click [Print], or Navigate to **Human Resources > State Requirements > NC > Retirement System Report**:

2 Make entries in the appropriate fields. The following table describes each field:

Field	Description
Reporting Month/Year	Month and year the report is being submitted. This date represents the first day of the reporting month; for example, contributions for **07/2007** represent a reporting month that begins on 07/01/2007.
Agency Number	State-assigned number identifying the employer.
Create Disk File	Determines whether a transmittal file of the same information will be generated with the report. Check this box to generate the file.

3 After making your entries, click [Print] to generate the report and submit it to *myReports*. If you checked the *Create Disk File* box, a transmittal file of the report data also will be sent to *myReports*.

Sample "North Carolina Retirement Systems Report"

Sample Transmittal File of the "North Carolina Retirement Systems Report"

North Carolina Local Retirement Report

For a selected reporting period, the "North Carolina Local Retirement Report" lists the gross wages and contributions for retirement-plan partici-pants. The following steps show you how to generate this report:

1 Navigate to **Human Resources > State Requirements > NC > Local Retirement Report**:

2 Make entries in the appropriate fields:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click [Save], a popup will ask you to name the report. Type the name, and click [OK]. The next time you want to run this report, select its name from the *Load Saved Report* dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title ("North Carolina Local Retirement Report") of the report.
Distribution Group	A group of people selected to receive the report in *myReports*. Click the dropdown prompt [v] to select the group, or click the blue-eye prompt [eye] to create a new distribution group. The report will be sent to *myReports* for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your *Human Resources User Guide*.)

Field	Description
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt ⌄ to select the group. To create a new e-mail group, click 📖.
From Check Date	Required. Reporting period start date. If multiple pay periods are reported in one batch, this date should match the earliest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/01/2007**.
To Check Date	Required. Reporting period end date. If multiple pay periods are reported in one batch, this date should match the latest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/31/2007**.
Month/Year	Month and year the report is submitted. This date represents the first day of the reporting month; for example, contributions for **07/2007** represent a reporting month that begins on 07/01/2007.
Unit Code Number	Required. Employer's state-assigned unit code number.
Create Disk File	Determines whether a transmittal file of the same information will be generated with the report. Check this box to generate the file.

3 Click the **Benefit Groups** tab.

4 Select one or more benefit groups from the *Available Benefit Group(s)* list box. Employees associated with these benefit groups will be included in the report.

- To select multiple benefit groups dispersed throughout the list, hold down the **<Ctrl>** key while selecting.

- To select multiple, consecutive benefit groups, hold down the **<Shift>** key, and select the first benefit group, then the last.

- Select at least one benefit group.

5 Click [image: Add button] to move the selected benefit group(s) from the *Available Benefit Group(s)* box to the *Selected Benefit Group(s)* box.

- [image: Add All button] moves all benefit groups, selected or not, to the *Selected Benefit Group(s)* box.

- [image: Remove button] returns the selected benefit groups to the *Available Benefit Group(s)* box.

- [image: Remove All button] returns all benefit groups to the *Available Benefit Group(s)* box.

6 Click the **Hour Codes** tab.

7 Select one or more hour codes from the *Available Hour Code(s)* box. (For instructions on how to make selections, see steps 4 and 5.)

8 Click the **Deductions** tab.

9 Select one or more deduction codes from the *Available Deduction Code(s)* box. Employees with these deductions for the pay period selected will be included in the report.(For instructions on how to make selections, see steps 4 and 5.)

10 After making your entries, click [image: Print button] to generate the report and submit it to *myReports*. If you checked the *Create Disk File* box, a transmittal file of the report also will be sent to *myReports*.

Sample "North Carolina Local Retirement Report"

New World Systems - 5.1 Test
North Carolina Local Retirement Report
From Date: 01/01/2007 - To Date: 06/25/2007

Name	SSN	Gross Wages	Contributions
ADAMOVICH , Stacy	501-07-5783	$1,441.60	$100.44
Advanced Rehab , Catherine	496-07-4898	$625.41	$28.14
Akroush , Marty	038-23-9089	$2,722.40	$166.37
AKROUSH , Viola	482-81-4599	$1,055.20	$65.05
Anderson & Associates , Nathan	556-72-5276	$1,663.20	$102.18
Aqua Designs, Inc. , Susan	524-86-4595	$285.95	$26.14
Arellano , Deborah	515-95-9535	$1,146.40	$168.19
ARETE 3 , Glenn	508-30-8364	$2,852.00	$368.66
BACCINO , Brian	520-48-0570	$2,717.00	$377.21
Baczek , Eugene	494-78-2620	$3,442.74	$489.54
BALCUINAS , Edward	530-95-5544	$889.20	$15.32
BARTNIK , Jennifer	528-00-2561	$1,352.00	$74.11
Barto , Ronald	478-19-0739	$2,576.39	$185.61
Bass , Brandon	529-16-7898	$2,982.34	$185.78
Beebe , James	481-35-8175	$1,476.80	$84.03
Bejda , Mimi	492-21-8929	$2,484.53	$198.70
Bekielewski , Tracy	527-70-4735	$2,042.47	$346.38
BENNETT , Dennis	485-59-3014	$3,887.52	$408.35
BERNACKI , James	483-20-3288	$2,962.49	$222.17
BEVAN , William	494-59-7995	$3,460.70	$605.20
Bizzieri , John	512-78-7797	$1,995.82	$107.38
Blair , Daniel	523-26-2366	$1,546.40	$114.50
Blankenship , Judy	503-76-9657	$1,526.40	$86.26
Blattner , Carl	481-35-7787	$2,771.96	$1,051.64
BLEDSOE , Cynthia	499-49-3651	$1,376.80	$81.53
BLEDSOE , Peggy	503-80-5059	$1,877.04	$104.04
BLUE STAR TECHNOLOGIES GROUP, LLC , Janet	517-22-6380	$2,044.35	$107.27
BOYCE , Matthew	136-86-0550	$1,746.40	$105.93

Sample Transmittal File of the "North Carolina Local Retirement Report"

```
23423    0SARDAMOVICH  501075783        0107    0144160 0010044
23423     CARdvanced Re496074898        0107    0062541 0002814
23423     MPAkroush    038239089        0107    0272240 0016637
23423    0V AKROUSH    482814599        0107    0105520 0006505
23423     N Anderson & 556725276        0107    0166320 0010218
23423     SARqua Design524864595        0107    0028595 0002614
23423    0DARrellano   515859535        0107    0114640 0016819
23423    2GMARETE 3    508308364        0107    0285200 0036866
23423    0B BACCINO    520480570        0107    0271700 0037721
23423    2EMBaczek     494782620        0107    0344274 0048954
23423    0EPBALCUINAS  530955544        0107    0088920 0001532
23423     JJBARTNIK    528002561        0107    0135200 0007411
23423    0RABarto      478190739        0107    0257639 0018561
23423     BDBass       529167898        0107    0298234 0018578
23423     JLBeebe      481358175        0107    0147680 0008403
23423     M Bejda      492218929        0107    0248453 0019870
23423    4950TLBekielewski527704735     0107    0204247 0034638
23423    2DMBENNETT    485593014        0107    0388752 0040835
23423    0JTBERNACKI   483203288        0107    0296249 0022217
23423    50WJBEVAN     494597995        0107    0346070 0060520
23423     JABizzieri   512787797        0107    0199582 0010738
23423     DJBlair      523262366        0107    0154640 0011450
23423    0J Blankenship503768657        0107    0152640 0008626
23423    0C Blattner   481357787        0107    0277196 0105164
23423    0C BLEDSOE    499493651        0107    0137680 0008153
23423    0P BLEDSOE    503805059        0107    0187704 0010404
23423     JLBLUE STAR T517226380        0107    0204435 0010727
23423    50MPBOYCE     136860550        0107    0174640 0010593
23423    0CTBREEN      530306858        0107    0115328 0006517
23423    2M BRITTON    502301720        0107    0335391 0026002
23423    0LRBrooker    500658957        0107    0148628 0012139
23423    0JMBROPHY     517383986        0107    0055620 0000200
```

North Carolina 401k Remittance Report

The following steps show you how to generate the "North Carolina 401k Remittance Report":

1   Navigate to **Human Resources > State Requirements > NC > 401k Remittance Report**:

2   Make entries in the appropriate fields:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click ![Save], a popup will ask you to name the report. Type the name, and click ![OK]. The next time you want to run this report, select its name from the *Load Saved Report* dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title ("North Carolina 401k Remittance Report") of the report.
Distribution Group	A group of people selected to receive the report in *myReports*. Click the dropdown prompt ![v] to select the group, or click the blue-eye prompt ![eye] to create a new distribution group. The report will be sent to *myReports* for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your *Human Resources User Guide*.)

Field	Description
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt ⌄ to select the group. To create a new e-mail group, click ⬚.
From Check Date	Required. Reporting period start date. If multiple pay periods are reported in one batch, this date should match the earliest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/01/2007**.
To Check Date	Required. Reporting period end date. If multiple pay periods are reported in one batch, this date should match the latest one; for example, if pay periods July 1, 2007-July 15, 2007 and July 16, 2007-July 31, 2007 are reported in this batch, select **07/31/2007**.
Location/Sub Plan	Required. Identifies the location or sub plan. This entry must contain 5 characters.
Payroll Center Name	Required. Identifies the payroll center submitting the report. This entry may include 32 characters.
Create Disk File	Determines whether a transmittal file of the same information will be generated with the report. Check this box to generate the file.

3 Click the **Benefit Groups** tab.

4 From the *Available Benefit Group(s)* list box, select one or more benefit groups to include on the report. Employees associated with these benefit groups will be included in the report.

- To select multiple benefit groups dispersed throughout the list, hold down the **<Ctrl>** key while selecting.

- To select multiple, consecutive benefit groups, hold down the **<Shift>** key, and select the first benefit group, then the last.

- Select at least one benefit group.

5 Click ![Add] to move the selected benefit group(s) from the *Available Benefit Group(s)* box to the *Selected Benefit Group(s)* box.

- ![Add All] moves all benefit groups, selected or not, to the *Selected Benefit Group(s)* box.

- ![Remove] returns the selected benefit groups to the *Available Benefit Group(s)* box.

- ![Remove All] returns all benefit groups to the *Available Benefit Group(s)* box.

6 Click the **Deductions** tab.

7 Select one or more deduction codes from the *Available Deduction Code(s)* box. Employees with these deductions for the pay period selected will be included in the report. (For instructions on how to make selections, see steps 4 and 5.)

8 Click the **Loan Deductions** tab.

9 From the *Available Deduction Code(s)* box, select one or more deduction codes for loan payments to include on the report. (For instructions on how to make selections, see steps 4 and 5.)

10 Click the **Benefits** tab.

11 From the *Available Benefit Code(s)* box, select one or more benefit codes to include on the report. (For instructions on how to make selections, see steps 4 and 5.)

12 Click the **Roth Deductions** tab.

13 From the *Available Deduction Code(s)* box, select one or more deduction codes for Roth contributions to include on the report. (For instructions on how to make selections, see steps 4 and 5.)

14 After making your entries, click ![Print] to generate the report and submit it to *myReports*. If you checked the *Create Disk File* box, a transmittal file of the report also will be sent to *myReports*.

Sample "North Carolina 401k Remittance Report"

New World Systems - 5.1 Test
North Carolina 401k Remittance Report
From Date: 01/01/2007 - To Date: 06/25/2007

Employee	SSN	Employee Contributions	Loan Payments	Employer Contributions	Roth Contributions
ADAMOVICH , Stacy	501-07-5783	$100.44	$100.44	$146.37	$100.44
Advanced Rehab , Catherine	496-07-4898	$28.14	$28.14	$60.04	$28.14
Akroush , Marty	038-23-9089	$166.37	$166.37	$9.24	$166.37
AKROUSH , Viola	482-81-4599	$65.05	$65.05	$106.76	$65.05
Anderson & Associates , Nathan	556-72-5276	$102.18	$102.18	$167.65	$102.18
Aqua Designs, Inc. , Susan	524-86-4595	$26.14	$26.14	$27.45	$26.14
Arellano , Deborah	515-85-9535	$168.19	$168.19	$116.14	$168.19
ARETE 3 , Glenn	508-30-8364	$368.66	$368.66	$15.75	$368.66
BACCINO , Brian	520-48-0570	$377.21	$377.21	$10.71	$377.21
Baczek , Eugene	494-78-2620	$489.54	$489.54	$15.54	$489.54
BALCUINAS , Edward	530-95-5544	$15.32	$15.32	$0.00	$15.32
BALMOR , Linda	496-12-0532	$0.00	$0.00	$1.05	$0.00
BARTNIK , Jennifer	528-00-2561	$74.11	$74.11	$129.79	$74.11
Barto , Ronald	478-19-0739	$185.61	$185.61	$261.40	$185.61
Bass , Brandon	529-16-7898	$185.78	$185.78	$9.66	$185.78
Beebe , James	481-35-8175	$84.03	$84.03	$149.96	$84.03
Bejda , Mimi	492-21-8929	$198.70	$198.70	$10.29	$198.70
Bekielewski , Tracy	527-70-4735	$346.38	$346.38	$207.42	$346.38
BENNETT , Dennis	485-59-3014	$408.35	$408.35	$16.38	$408.35
BERNACKI , James	483-20-3288	$222.17	$222.17	$11.13	$222.17
BEVAN , William	494-59-7995	$605.20	$605.20	$18.90	$605.20
Bizzieri , John	512-78-7797	$107.38	$107.38	$199.79	$107.38
Blair , Daniel	523-26-2366	$114.50	$114.50	$156.64	$114.50
Blankenship , Judy	503-76-8657	$86.26	$86.26	$154.30	$86.26
Blattner , Carl	481-35-7787	$1,051.64	$1,051.64	$276.61	$1,051.64
BLEDSOE , Cynthia	499-49-3651	$81.53	$81.53	$132.17	$81.53
BLEDSOE , Peggy	503-80-5059	$104.04	$104.04	$188.81	$104.04
BLUE STAR TECHNOLOGIES GROUP, LLC , Janet	517-22-6380	$107.27	$107.27	$196.26	$107.27

Sample Transmittal File of the "North Carolina 401k Remittance Report"

```
001COMBINED   002003   20070627000000C
11401002003   5010757830123435     **A000010044**P000014637**U000010044              20070117   ADAMOVICH, Stacy A
385 002003   5010757830123451     000010044        2    PDED
11401002003   4960748980123435     **A000002814**P000006004**U000002814              20070117   Advanced Rehab, Catheri
385 002003   4960748980123451     000002814        2    PDED
11401002003   0382390890123435     **A000016637**P000000924**U000016637              20070117   Akroush, Marty P
385 002003   0382390890123451     000016637        2    PDED
11401002003   4828145990123435     **A000006505**P000010676**U000006505              20070117   AKROUSH, Viola
385 002003   4828145990123451     000006505        2    PDED
11401002003   5567252760123435     **A000010218**P000016765**U000010218              20070117   Anderson & Associates,
385 002003   5567252760123451     000010218        2    PDED
11401002003   5248645950123435     **A000002614**P000002745**U000002614              20070117   Aqua Designs, Inc., Sus
385 002003   5248645950123451     000002614        2    PDED
11401002003   5158595350123435     **A000016819**P000011614**U000016819              20070117   Arellano, Deborah A
385 002003   5158595350123451     000016819        2    PDED
11401002003   5083083640123435     **A000036866**P000001575**U000036866              20070117   ARETE 3, Glenn M
385 002003   5083083640123451     000036866        2    PDED
11401002003   5204805700123435     **A000037721**P000001071**U000037721              20070117   BACCINO, Brian
385 002003   5204805700123451     000037721        2    PDED
11401002003   4947826200123435     **A000048954**P000001554**U000048954              20070117   Baczek, Eugene M
385 002003   4947826200123451     000048954        2    PDED
11401002003   5309555440123435     **A000001532**P000000000**U000001532              20070112   BALCUINAS, Edward P
11401002003   4961205320123435     **A000000000**P000000105**U000000000              20070112   BALMOR, Linda S
11401002003   5280025610123435     **A000007411**P000012979**U000007411              20070117   BARTNIK, Jennifer J
385 002003   5280025610123451     000007411        2    PDED
11401002003   4781907390123435     **A000018561**P000026140**U000018561              20070117   Barto, Ronald A
385 002003   4781907390123451     000018561        2    PDED
11401002003   5291678980123435     **A000018578**P000000966**U000018578              20070117   Bass, Brandon D
385 002003   5291678980123451     000018578        2    PDED
11401002003   4813581750123435     **A000008403**P000014996**U000008403              20070117   Beebe, James L
385 002003   4813581750123451     000008403        2    PDED
11401002003   4922189290123435     **A000019870**P000001029**U000019870              20070117   Bejda, Mimi
385 002003   4922189290123451     000019870        2    PDED
11401002003   5277047350123435     **A000034638**P000020742**U000034638              20070117   Bekielewski, Tracy L
385 002003   5277047350123451     000034638        2    PDED
11401002003   4855930140123435     **A000040835**P000001638**U000040835              20070117   BENNETT, Dennis M
385 002003   4855930140123451     000040835        2    PDED
11401002003   4832032880123435     **A000022217**P000001113**U000022217              20070117   BERNACKI, James T
385 002003   4832032880123451     000022217        2    PDED
11401002003   4945979950123435     **A000060520**P000001890**U000060520              20070117   BEVAN, William J
385 002003   4945979950123451     000060520        2    PDED
11401002003   5127877970123435     **A000010738**P000019979**U000010738              20070117   Bizzieri, John A
385 002003   5127877970123451     000010738        2    PDED
11401002003   5232623660123435     **A000011450**P000015664**U000011450              20070117   Blair, Daniel J
```

North Carolina Quarterly Wage Report

User-Defined Check Box Setup

A check box indicating whether an employee's wages are seasonal needs to be added to the **NC Orbit** section on the "Employee User-Defined" page in *Employee Maintenance*. To add this check box, follow these steps:

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

2 Select *Employee* from the *Record Type* dropdown.

3 Select *Attributes* from the *Maintenance Type* dropdown. The page will refresh to show a grid of existing user-defined employee fields and, where applicable, their associated section headers.

4 Click [New]. The "User-Defined Fields" popup will open.

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

Field	Value
Name	**NCSeasonalIndicator**
Section Header	**NC Orbit**
Sequence Number	(Leave this field blank.)
Data Type	**Check Box**

6 Click [OK]

⬛ NOTE:

For wages to be reported as seasonal, an employee's work assignment must be deemed a seasonable pursuit by ESC of North Carolina.

Generating the Report

The following steps show you how to generate the "North Carolina Quarterly Wage Report":

1 Navigate to **Human Resources > State Requirements > NC > Quarterly Wage Report**:

2 Make entries in the appropriate fields:

Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click [Save], a popup will ask you to name the report. Type the name, and click [OK]. The next time you want to run this report, select its name from the *Load Saved Report* dropdown, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
Override Report Title	Overrides the default title ("North Carolina Quarterly Wage Report") of the report.
Distribution Group	A group of people selected to receive the report in *myReports*. Click the dropdown prompt [v] to select the group, or click the blue-eye prompt [👁] to create a new distribution group. The report will be sent to *myReports* for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your *Human Resources User Guide*.)

Field	Description
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt ⌄ to select the group.
Quarter	Required. Identifies the fiscal quarter being reported. The available selections are 1, 2, 3 and 4.
Year	Required. Identifies the year of the fiscal quarter being reported. Type all four digits of the year.
Employer Account Number	Required. Employer's account number. This entry must be 1 to 7 characters.
Remitter Number	Optional. Identifies the remitter. This entry must be 1 to 6 characters.
Taxable Wage Base	Required. Minimum amount of annual wages that are taxable for unemployment insurance.
Create Disk File	Determines whether a transmittal file of the same information will be generated with the report. Check this box to generate the file.

3 Click the **Benefit Groups** tab.

4 Select one or more benefit groups from the *Available Benefit Group(s)* list box. Employees associated with these benefit groups will be included in the report.

- To select multiple benefit groups dispersed throughout the list, hold down the **<Ctrl>** key while selecting.

- To select multiple, consecutive benefit groups, hold down the **<Shift>** key, and select the first benefit group, then the last.

- Select at least one benefit group.

5 Click [>] to move the selected benefit group(s) from the *Available Benefit Group(s)* box to the *Selected Benefit Group(s)* box.

- [>>] moves all benefit groups, selected or not, to the *Selected Benefit Group(s)* box.

- [<] returns the selected benefit groups to the *Available Benefit Group(s)* box.

- [<<] returns all benefit groups to the *Available Benefit Group(s)* box.

6 Click the **Hour Codes** tab.

7 Select one or more hour codes from the *Available Hour Code(s)* box. (For instructions on how to make selections, see steps 4 and 5.)

8 After making your entries, click `Print` to generate the report and submit it to *myReports*. If you checked the *Create Disk File* box, a transmittal file of the report also will be sent to *myReports*.

Sample "North Carolina Quarterly Wage Report"

Sample Transmittal File of the "North Carolina Quarterly Wage Report"