

Ohio State Requirements

User Guide



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REPORT SETUP

Overview

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

1 "User Defined Fields Setup" on page 1-2 details how to set up benefit, deduction, and hours code as user-defined fields necessary to run the Ohio Police and Fire Pension report.



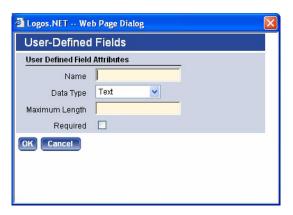
User Defined Fields Setup

The Ohio Police and Fire Pension Report requires that deductions, benefits, and hours code fields are set up in User-Defined Fields. These fields accommodate pension contributions made by 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 the pension fund depend on the plan to which the employee belongs.

Setting Up Deductions

To set up deduction user-defined fields for the Ohio Police and Fire Pension Report:

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



4 Complete the fields *exactly* as follows:

Table 1.1

Control	Value
Name	OHP&F
Data Type	Text
Maximum Length	1
Required	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 pension category code.



3 Click the User Defined Fields button. The "Deduction Code User Defined Fields" page displays.



- 4 Click the OHP&F 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 1.2

Value	Meaning
Р	Deduction should be included as a pre-tax deduction.
Τ	Deduction should be included as a taxable deduction.

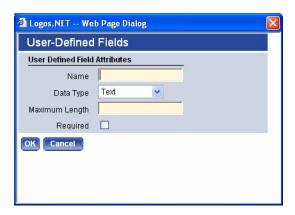
- 6 Click Save.
- 7 Repeat Steps 2-6 for the remainder of the deductions for which you want to add a pension category code.



Setting Up Benefits

To set up benefit user-defined fields for the Ohio Police and Fire Pension Report:

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



4 Complete the fields *exactly* as follows:

Table 1.3

Control	Value
Name	OHP&F
Data Type	Text
Maximum Length	1
Required	Unselected

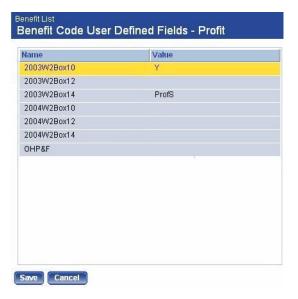
5 Click OK.

To set up category codes for benefits:

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



3 Click the User Defined Fields button. The "Benefit Code User Defined Fields" page displays.



- 4 Click the OHP&F 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 1.4

Value	Meaning
Y	Benefit should be included in the report.

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

Setting Up Hours Codes

To set up hours codes user-defined fields for the Ohio Police and Fire Pension 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.



3 Click the New button. The "User-Defined Fields" popup displays.



4 Complete the fields *exactly* as follows:

Table 1.5

Control	Value
Name	OHP&F
Data Type	Text
Maximum Length	1
Required	Unselected

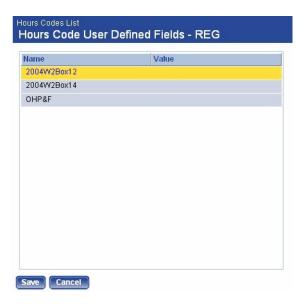
5 Click OK.

To set up category codes for hours codes:

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



3 Click the User Defined Fields button. The "Hour Code User Defined Fields" page displays.



- 4 Click the OHP&F 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 1.6

Value	Meaning
0	Regular Pay - Pay that keeps the member on payroll /makes up the Hours Base.
1	Holiday Pay - Pay for holidays. Report dates if they differ from the current date.
2	Overtime Pay - Do not report hours paid.
3	Longevity - Do not report hours paid.
4	Shift Differential - Use only if paid a lump sum outside current PPE dates. Do not report hours.
5	Acting Pay - Use only if paid a lump sum outside the current PPE dates. Do not report hours.
6	Retro Pay - Use on individual retro reports broken out by Pay Period ending dates. Do not report hours paid.
7	Current Additional Allowable Salary - Do not report hours paid.
8	Lump Sum Additional Allowable Salary - Do not report hours paid.
9	Military Pay - Do not report hours paid.
Α	Educational Allowance - Do not report hours paid.
В	Performance Bonus - Do not report hours paid.



Table 1.6

Value	Meaning
С	Sick Leave Incentive - Pensionable only if it does not reduce the member's sick leave bank. Do not report hours paid.
D	Stress/Hazard Pay - Do not report hours paid.
E	Special Duty - Pensionable only if the employer assumes responsibility of payment to the member. Do not report hours paid.

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

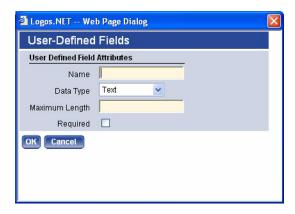


If any other codes are required, obtain these from the Ohio Police and Fire Pension administrator. Set up these codes using the same steps above.

Setting Up Employees

To set up employee user-defined fields for the Ohio PERS 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 1.7

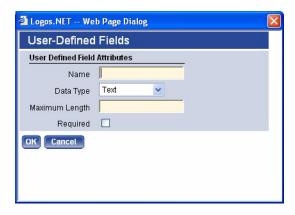
Control	Value
Name	Ohio PERS Begin Code
Data Type	Validation Set



Table 1.7

Control	Value
Validation Set	Ohio PERS Employee Begin Code
Required	Unselected

- 5 Click OK.
- 6 Click the New button. The "User-Defined Fields" popup displays again:

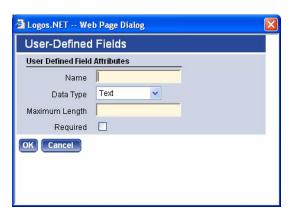


7 Complete the fields *exactly* as follows:

Table 1.8

Control	Value
Name	Ohio PERS Begin Date
Data Type	Date/Time
Required	Unselected

- 8 Click OK.
- 9 Click the New button. The "User-Defined Fields" popup displays:



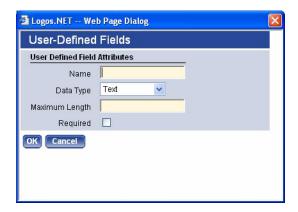


10 Complete the fields *exactly* as follows:

Table 1.9

Control	Value
Name	Ohio PERS End Code
Data Type	Validation Set
Validation Set	Ohio PERS Employee End Code
Required	Unselected

- 11 Click OK.
- 12 Click the New button. The "User-Defined Fields" popup displays.



13 Complete the fields *exactly* as follows:

Table 1.10

Control	Value
Name	Ohio PERS End Date
Data Type	Date/Time
Required	Unselected

14 Click OK.



When you go into an employee record, you will now be able to see this information on the user-defined fields attribute:





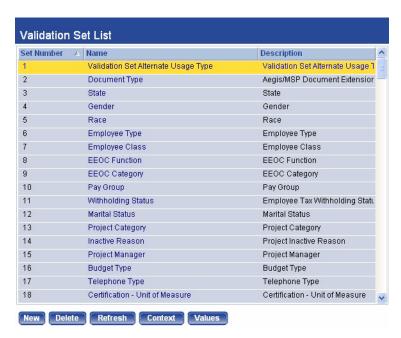
Validation Sets

Alternate Values

The existing pay group frequencies must be expressed precisely to be used by the transmittal file. To meet this need, the Pay Group validation set must have alternate values defined for use by the Ohio PERS Report.

To set up these values,

1 Go to Maintenance > System > Validation Sets > Validation Set List. You will see the following screen:



2 Click on the Values button for Line 1, Validation Set Alternate Usage Type. You will see a screen like the following:





3 Click **New** to add a new alternate usage type. You will see the following screen:



- **4** Enter OHPERS in both the *Value* and the *Description* controls.
- 5 Click Save.
- Return to the Validation Set List and click on Validation Set 10 (Pay Group). Click on the **Values** button. You will see a screen like the following:



- 7 Highlight each row and click the Alternates button.
- **8** Click on the **New** button. You will see the following screen:



9 Select OHPERS in the *Usage Type* control. Enter a record for each row below by entering the *Value* and *Description* for each. Click **OK** after each is added; then click **New** to add the next one:

Table 1.11

Value	Description
1	Annual
2	Semi-annual
3	Quarterly



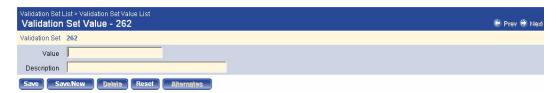
Table 1.11

Value	Description
4	Monthly
5	28-day Period
6	Semi-Monthly
7	Bi-Weekly
8	Weekly

10 These values will now display in the *Payroll Cycle* control on the Ohio PERS Report page.

Validation Set Values

- 1 Go to the Validation Set List and click on the validation set for Ohio PERS Begin Code. Click on the Values button.
- 2 Click New. You will see the following screen:



Enter a record for each row below by entering the *Value* and *Description* for each. Click **OK** after each is added; then click **New** to add the next one:

Table 1.12 OHIO PERS Begin Code Alternate Values

Value	Description
Α	Name Change
Ν	New Employee
R	Return from Leave
S	Social Security Change
X	Both Name and SSN Change

For new employees, the system will supply the "N" value on the report for the employee. The user will need to enter the other codes and the corresponding date.

4 Return to the Validation Set List and click on the validation set for Ohio PERS End Code. Click on the Values button.

5 Click New. Enter a record for each row below by entering the *Value* and *Description* for each. Click **OK** after each is added; then click **New** to add the next one:

Table 1.13 OHIO PERS End Code Alternate Values

Value	Description
D	Death
L	Leave of Absence
Q	Quit
R	Retired
<i>T</i>	Transferred

When an employee has been terminated, the system will supply the "Q" value on the report for the employee and will use the termination date. The user will need to enter the other codes and the corresponding date.



CHAPTER

REPORTS

Overview

This chapter provides detailed window and field information for Ohio 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.oh.us

NOTE:

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

- 1 "PERS Report" on page 2-2 enables authorized users to select the information that appears on the Ohio Retirement Report and submit it to myReports.
- 2 "Quarterly Tax and Wage Report" on page 2-8 provides specific window and field information for the "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."
- 3 "Create Ohio Police and Fire Data" on page 2-13 is used to create a work file into which data from payroll is entered.
- 4 "Ohio Police and Fire Pension List" on page 2-15 allows authorized users to review and maintain pension information for each employee within an organization.
- **5** "Ohio Police and Fire Pension" on page 2-18 enables authorized users to add an employee to the pension list or to maintain an employee already on the list.
- **6** "Print Ohio Police and Fire Pension" on page 2-20 enables authorized users to produce the Ohio Police and Fire Pension report.



PERS Report

The "PERS Report," accessed from the Human Resources menu (Human Resources > State Requirements > OH > PERS), enables authorized users to select the information that appears on the Ohio 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 2.1 "PERS Report" Controls

Table 2.1 Like Report Controls		
Control	Description	
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is blank>.	
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.	
PERS Employer Code	This control is required. Enter the employer's six-digit code.	
Period Begin Date	This control is required. Enter the first pay batch end date for which the report should be run.	
Period End Date	This control is required. Enter the last pay batch end date for which the report should be run.	
Reporting Frequency	This control is required. Enter how often the report should be run: monthly, semi-monthly, or bi-weekly.	
Contribution Percentage	This control allows for the separation of the employer contributions paid for employees. If a <i>Contribution Percentage</i> is entered, it will be used to calculate gross wages; for example, if 10% were the contribution percentage and \$140 the contribution, the calculation would divide 140 by .10, and the gross wages would equal \$1400.	



Benefit Groups Tab

As the default visible tab of the "PERS Report" page, the "Benefit Groups" tab enables users to specify the employees to include on the report by selecting their benefit groups. This tab is shown as the default under "PERS Report."

Benefit Groups Tab Entry Control Descriptions

 Table 2.2
 "PERS Report" Benefit Groups Tab Controls

Control	Description
Available Benefit Groups	This control displays all benefit groups to which the user has authority. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups.
Selected Benefit Groups	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 "PERS Report" Benefit Groups Tab Command Buttons

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



Deductions Tab

The "Deductions" tab enables users to specify the deductions to include on the report. The deduction amounts using these deduction codes will be reported as contributions. Only employees with one or more of these deduction codes in the reporting period will be included on the report.



Deductions Tab Entry Control Descriptions

Table 2.4 "PERS Report" Deductions Tab Controls

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

Deductions Tab Command Buttons

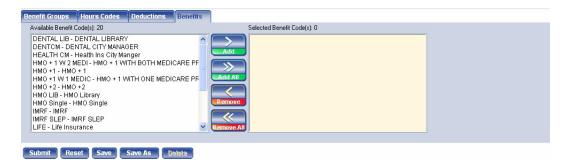
Table 2.5 "PERS Report" Deductions Tab Command Buttons

Button	Description
Add	This button moves all selected deductions in the <i>Available Deductions</i> multi-select textbox to the <i>Selected Deductions</i> multi-select textbox. If no deductions are listed in the <i>Available Deductions</i> multi-select textbox, the Add command button is disabled.
Add All	This button moves all deductions from the <i>Available Deductions</i> multi-select textbox to the <i>Selected Deductions</i> multi-select textbox. If no deductions are listed in the <i>Available Deductions</i> multi-select textbox, the Add All command button is disabled.
Remove	This button moves all selected deductions from the Selected Deductions multi-select textbox to the Available Deductions multi-select textbox. If no deductions are listed in the Selected Deductions multi-select textbox, the Remove command button is disabled.
Remove All	This button moves all deductions from the Selected Deductions multi-select textbox to the Available Deductions multi-select textbox. If no deductions are listed in the Selected Deductions multi-select textbox, the Remove All command button is disabled.



Benefits Tab

The "Benefits" tab enables users to specify the benefits to include on the report. If you have employer-paid benefits that you want reported as contributions, select them here. If you report only employee-paid deductions as contributions, do not select any benefits here.



Benefits Tab Entry Control Descriptions

Table 2.6 "PERS Report" Benefits Tab Controls

Control	Description
Available Benefits	This control displays all benefits to which the user has authority. Users may use Ctrl+Click to select multiple benefits or Shift+Click to select a range of benefits.
Selected Benefits	This control displays all benefits that have been selected to include on the listing. Users may use Ctrl+Click to select multiple benefits or Shift+Click to select a range of benefits.

Benefits Tab Command Buttons

Table 2.7 "PERS Report" Benefits Tab Command Buttons

Button	Description
Add	This button moves all selected benefits in the <i>Available Benefits</i> multi-select textbox to the <i>Selected Benefits</i> multi-select textbox. If no benefits are listed in the <i>Available Benefits</i> multi-select textbox, the Add command button is disabled.
Add All	This button moves all benefits from the <i>Available Benefits</i> multi-select textbox to the <i>Selected Benefits</i> multi-select textbox. If no benefits are listed in the <i>Available Benefits</i> multi-select textbox, the Add All command button is disabled.
Remove	This button moves all selected benefits from the Selected Benefits multi-select textbox to the Available Benefits multi-select textbox. If no benefits are listed in the Selected Benefits multi-select textbox, the Remove command button is disabled.
Remove All	This button moves all benefits from the Selected Benefits multi-select textbox to the Available Benefits multi-select textbox. If no benefits are listed in the Selected Benefits multi-select textbox, the Remove All command button is disabled.



Command Buttons

Table 2.8 "PERS Report" Command Buttons

	·
Button	Description
Submit	This button automatically sends the "PERS Report" to myReports and produces a transmittal file.
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>PERS Employer Code</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>PERS Employer Code</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>PERS Employer Code</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>PERS Employer Code</i> control. This button is hidden if the user does not have the appropriate security permissions.

Report Output

Generated via the "PERS Report" page, the report provides users with information detailing retirement information for employees. The report and transmittal file include the deduction/benefit gross from the deductions and benefits selected. Data on the report is sorted by *Social Security Number* and includes all employees whose batch pay end date is between the *Period Begin Date* and *Period End Date*, who are in the benefit group, and who have the selected deduction(s) specified. The report includes a count of all employees, and a total for the Gross Wages and Contributions columns. A sample report appears below.

				City	of NWS			
					RS Rep			
SSN		Begin Code	Begin Date	End Code	End Date	Frequency	Gross Wages	Contribution
000-00-0333	Akins , Joshua		01/01/2008		01/30/2009	7	\$26,589.50	\$4,471.5
000-00-0333	Akins , Joshua		01/01/2008		01/30/2009	7	\$0.00	\$32.5
451-48-1161	ALLIANCE EQUIPMENT COMPANY INC , Jeffery		01/01/2008		01/30/2009	7	\$4,304.00	\$3,383.1
455-60-3569	ATLANTIC TEXTILE COMPANY, Greg		01/01/2008		01/30/2009	7	\$0.00	\$4,603.7
055-81-2954	Baber , Michelle		01/01/2008		01/30/2009	7	98,820.37	\$9,152.7
485-54-8228	BACKUP TRAINING CORPORATION , Ronald		01/01/2008		01/30/2009	7	\$0.00	\$14.0
083-08-8108	Bacon , Vivian		01/01/2008	Q	7/3/2008	7	\$3,254.65	\$5,360.8
450-98-0782	Baird , Danny		01/01/2008		01/30/2009	7	\$0.00	\$13.2
486-01-9874	Baker , Christopher		01/01/2008		01/30/2009	7	\$0.00	\$12,355.3
488-87-9041	Barton , Larry		01/01/2008		01/30/2009	7	\$0.00	\$7,393.0
448-39-7724	Barton , Larry		01/01/2008		01/30/2009	7	\$0.00	\$7,246.
483-21-3085	Beebout , Michael		01/01/2008		01/30/2009	7	\$20,692.40	\$8,379.
480-31-7527	Boger , Chad		01/01/2008		01/30/2009	7	\$0.00	\$20,192.0
489-14-9201	Boger , Thomas		01/01/2008		01/30/2009	7	\$0.00	\$11,274.0
453-88-1916	Brandon , Andrew		01/01/2008		01/30/2009	7	\$0.00	\$4,027.
458-61-0145	Braun , Joseph		01/01/2008		01/30/2009	7	\$0.00	\$7,159.
449-43-0863	Braun , Joseph		01/01/2008		01/30/2009	7	\$0.00	\$11,048.3
483-28-7477	Braun , Joseph		01/01/2008		01/30/2009	7	\$0.00	\$8,875.
457-25-8179	Bruns , Tyson		01/01/2008		01/30/2009	7	\$0.00	\$9,686.
538-50-4864	Bunn , Daniel		01/01/2008		01/30/2009	7	\$0.00	\$16,575.9
423-13-8035	Burns , Shawn		01/01/2008		01/30/2009	7	\$0.00	\$2,811.
489-22-9357	Castle , Scott		01/01/2008		01/30/2009	7	\$0.00	\$18,198.8
455-56-7061	Clark , Steven		01/01/2008		01/30/2009	7	\$0.00	\$4,574.5
587-11-4793	CLOSE, Cynthia		01/01/2008		01/30/2009	7	\$0.00	\$2,075.1
486-16-6238	CREECY, Courtney		01/01/2008		01/30/2009	7	\$0.00	\$11,712.8
036-98-5210	Crunch , Chris	N	8/10/2008		01/30/2009	7	\$44,455.68	\$2,830.0



Report Fields

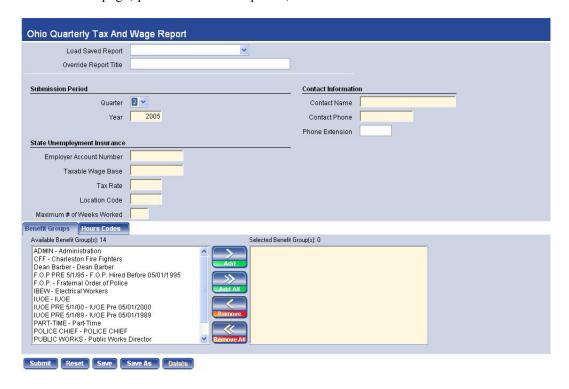
Table 2.9 "PERS Report" Fields

Column	Description
SSN	This column displays the Social Security Number of the employee.
Name	This column displays the name of the employee.
Begin Date	This column displays the first pay batch end date of the reporting period.
End Date	This column displays the last pay batch end date of the reporting period.
Gross Wages	This column displays the sum of wages paid for the selected hours codes.
Contributions	This column displays the sum of employee deduction and benefit amounts.



Quarterly Tax and Wage Report

The "Quarterly Tax and Wage Report" page, accessed from the Human Resources menu (Human Resources > State Requirements > OH > Quarterly Wage Report), enables authorized users to select the information that appears on the Ohio 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 2.10 "Quarterly Tax and Wage Report" Controls

Control	Description
Load Saved Report	This control enables you to retrieve selection criteria that has been previously defined. It displays a list of all saved report settings in alphanumeric order (with numerics displaying first). An unlimited number of selection criteria combinations for a report option can be stored. The default selection is blank>.
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Submission Period	This section groups submission period information for the report.
Quarter	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.
Year	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.
State Unemployment Insurance	This section groups the controls used to calculate state unemployment insurance.



Table 2.10 "Quarterly Tax and Wage Report" Controls (continued)

Control	Description
Employer Account Number	This control is required. Enter the employer's account number.
Taxable Wage Base	This control is required. Enter the amount of annual wages that are taxable for unemployment insurance.
Tax Rate	This control is required. Enter the tax rate used to calculate unemployment insurance. Enter .0000 if the state has not provided you with a tax rate.
Location Code	This control is required. It may contain up to three digits. Enter the employer's location code.
Maximum Number of Weeks Worked	This control is required. Acceptable values are 1-99. Enter the maximum number of weeks worked in this quarter that can be applied to unemployment insurance.
Contact Information	This section groups contact information for the report.
Contact Name	This control is required. Enter the name of the person to contact with questions or concerns about the quarterly wage information.
Contact Phone	This control is required. Enter the contact person's phone number. It must contain ten digits.
Phone Extension	The contact person's phone extension, if applicable.

Benefit Groups Tab

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

Benefit Groups Tab Entry Control Descriptions

Table 2.11 "Quarterly Tax and Wage Report" Benefit Groups Tab Controls

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



Benefit Groups Tab Command Buttons

Table 2.12 "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 Selected Benefit Group(s) multi-select textbox to the Available Benefit Group(s) multi-select textbox. If no benefit groups are listed in the Selected Benefit Group(s) multi-select textbox, the Remove command button is disabled.
Remove All	This button moves all benefit groups from the Selected Benefit Group(s) multi-select textbox to the Available Benefit Group(s) multi-select textbox. If no benefit groups are listed in the Selected Benefit Group(s) multi-select textbox, the Remove All command button is disabled.

Hours Codes Tab

The "Hours Codes" tab enables users to specify the employees to include on the report by selecting their hours codes.

Hours Codes Tab Entry Control Descriptions

Table 2.13 "Quarterly Tax and Wage Report" Hours Codes Tab Controls

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

Hours Codes Tab Command Buttons

Table 2.14 "Quarterly Tax and Wage Report" Hours Codes Tab Command Buttons

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



 Table 2.14 "Quarterly Tax and Wage Report" Hours Codes Tab Command Buttons (continued)

Button	Description
Remove	This button moves all selected hours codes from the Selected Hours Code(s) multi-select textbox to the Available Hours Code(s) multi-select textbox. If no hours codes are listed in the Selected Hours Code(s) multi-select textbox, the Remove command button is disabled.
Remove All	This button moves all hours codes from the Selected Hours Code(s) multi-select textbox to the Available Hours Code(s) multi-select textbox. If no hours codes are listed in the Selected Hours Code(s) multi-select textbox, the Remove All command button is disabled.

Command Buttons

Table 2.15 "Quarterly Tax and Wage Report" Command Buttons

Button	Description
Submit	This button automatically sends the "Quarterly Tax and Wage Report" to myReports and produces a transmittal file that can be sent to the state.
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 "Quarterly Tax and Wage Report" page, the report provides users with information for quarterly unemployment insurance wage reporting. Use this report as a guide for preparing the Ohio Quarterly Tax and Wage Report. A sample report appears below. The report is sorted by *Employee Name* and includes a count of employees and a sum of each wage column at the end of the report.

City of Logos Ohio Quarterly Tax And Wage Report From Date: 01.01/2005 - To Date: 03/31/2005					
SSN	Employee Name	Unemployment Quarterly Wages	Excess Wages Stat	e Taxable Wages	Weeks Worked
252-33-8877	AAron , Aaron	\$2,896.56	\$0.00	\$2,896.56	2
939-53-7699	Adkins , Kara	\$1,074.13	\$0.00	\$1,074.13	8
939-39-8299	Akins , Kristin	\$1,191.46	\$0.00	\$1,191.46	6
939-69-7866	Alford , Dean	\$21,086.35	\$0.00	\$21,086.35	4
949-52-5622	Allen , Mary	\$987.04	\$0.00	\$987.04	6
939-21-7655	Anderson , Rachel	\$1,378.00	\$0.00	\$1,378.00	6
939-97-6633	Andrews , Jennifer	\$790.92	\$0.00	\$790.92	6
939-59-5288	Applegate, Brian	\$3,093.16	\$0.00	\$3,093.16	4
939-01-7465	Armstrong , Benjamin	\$2,554.11	\$0.00	\$2,554.11	4
939-26-6666	Arnold , Bryan	\$3,901.17	\$0.00	\$3,901.17	4
939-59-7633	Atwood, Matthew	\$1,933.32	\$0.00	\$1,933.32	6
939-50-6200	Bailey , Kevin	\$3,906.08	\$0.00	\$3,906.08	4
039-19-6455	Baker, Douglas	\$2,866.16	\$0.00	\$2,866.16	4
939-77-3677	Baker, Georgia	\$2,472.93	\$0.00	\$2,472.93	4
949-73-1199	Ball , Carl	\$3,540.64	\$0.00	\$3,540.64	4
939-14-3811	Ballard , Paul	\$4,436.89	\$0.00	\$4,436.89	4
939-21-6200	Barber , George	\$3,989.08	\$0.00	\$3,989.08	4
939-47-5833	Barr , Mark	\$3,581.07	\$0.00	\$3,581.07	4
939-62-5644	Beason , Mathew	\$3,202.29	\$0.00	\$3,202.29	4
939-19-5866	Beltz , John	\$3,901.18	\$0.00	\$3,901.18	4

Report Fields

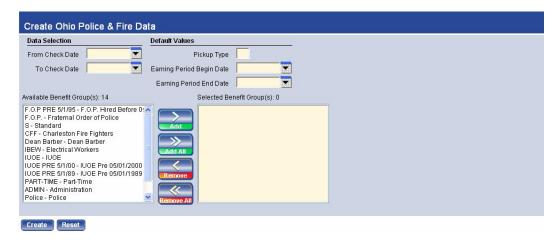
Table 2.16 "Quarterly Tax and Wage Report" Fields

Column	Description
SSN	This column displays the Social Security Number of the employee.
Employee Name	This column displays the name of the employee.
UI Quarterly Wages	This column displays the employee's total wages for the quarter.
Excess Wages	This column displays the employee's wage amount that is over the amount taxed for unemployment insurance.
Taxable Wages	This column displays the employee's wages amount taxable that was taxed for unemployment insurance.
Weeks Worked	This column displays the number of weeks the employee has worked during the quarter.



Create Ohio Police and Fire Data

The "Create Ohio Police and Fire Data" page, accessed from the Human Resources menu (Human Resources> State Requirements> OH> Create Police Fire Pension Data), is used to create a work file into which data from payroll is entered. This data can be reviewed and modified before it is submitted to the state.



Entry Control Descriptions

Table 2.17 "Create Ohio Police and Fire Data" Controls

Control	Description
Data Selection	This section organizes the date controls that determine what data will be selected to create data.
From Check Date	This control is required. Enter the first check date that should be included in the data.
To Check Date	This control is required. Enter the last check date that should be included in the data.
Default Values	This section organizes the controls that determine the default dates for the data.
Pickup Type	This control is required. Enter the one-character pickup type code.
Earning Period Begin Date	This control is required. Enter the begin date that will appear on each created record.
Earning Period End Date	This control is required. Enter the end date that will appear on each created record.
Available Benefit Groups	This control displays all benefit groups. Users may use Ctrl+Click to select multiple benefit groups or Shift+Click to select a range of benefit groups. This control, combined with the Selected Benefit Groups control, are used to select which employees will have data created as a result of their association with a particular benefit group.
Selected Benefit Groups	This control displays all benefit groups that have been selected to include on the report. 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 Command Buttons

Table 2.18 "Create Ohio Police and Fire Data" Benefit Codes Command Buttons

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

Command Buttons

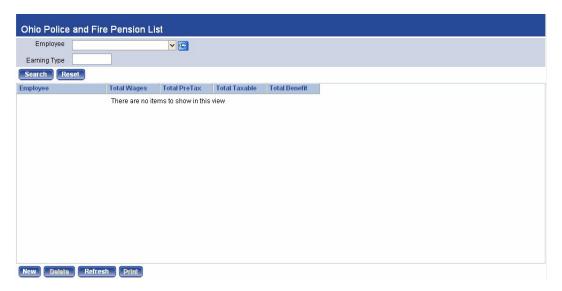
Table 2.19 "Create Ohio Police and Fire Data" Command Buttons

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 pension data and inserts the current pension data into the table.
Reset	This button clears the entry controls without saving any data, and returns the cursor focus to the From Check Date control.



Ohio Police and Fire Pension List

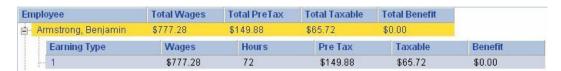
The "Ohio Police and Fire Pension List" page, accessed from the Human Resources menu (Human Resources> State Requirements> OH> Police and Fire Pension List), allows authorized users to review and maintain pension information for each employee within an organization. When you first enter the page, you will see a screen like the following:



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



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





Search Control Descriptions

Table 2.20 "Ohio Police and Fire Pension List" Search Controls

Control	Description
Employee	Select the name of an employee if you want to search for results for one employee only.
Earning Type	Enter the one-character code for an earning type if you want to return results for all employees with a particular earning type.

Search Command Buttons

Table 2.21 "Ohio Police and Fire Pension List" Search Command Buttons

Button	Description
Search	This button sends a search message to the pension 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.

Search List Results

The information is displayed in an expandable list that offers additional information for each employee. Clicking the
icon in list expands the Employee list to display the Earning Type, Wages, Hours, Pretax, Taxable, and Benefit information. Clicking the
icon in the pension Search list collapses the Employee list and hides the Earning Type, Wages, Hours, Pretax, Taxable, and Benefit information.

The default sort order of the Employee list is by *Earning Type* (in descending order.) The *Earning Type* in the list is hyperlinked. Clicking on the link opens the "Ohio Police and Fire Pension" in EDIT mode with the cursor focus in the *Employee* control. The default sorting order of the pension Search list is by *Employee* (alpha, descending order).

Table 2.22 "Ohio Police and Fire Pension List" Grid

Column	Description
Employee	This column displays the employee's number within the organization and the employee's name.
Total Wages	This column displays the employee's total pensionable wages paid for the current pay period.
Total Pretax	This column displays the employee's total pretax pension deductions for the current pay period.
Total Taxable	This column displays the employee's total taxable pension deductions for the current pay period.
Total Benefit	This column displays the total amount of pension benefits paid to the employee for this pay period.
Earning Type	This column displays as a hyperlink the type of earnings (e.g., regular, overtime, etc.). Clicking on the link opens the "Ohio Police and Fire Pension" page.
Wages	This column displays the employee's total wages paid for this pay type.



Table 2.22 "Ohio Police and Fire Pension List" Grid (continued)

Column	Description
Hours	This column displays the number of hours the employee worked for this pay type in the current pay period.
Pretax	This column displays the employee's pre-tax deductions paid for this pay type.
Taxable	This column displays the employee's taxable deductions paid for this pay type.
Benefit	This column displays the employee's benefits paid for this pay type.

Command Buttons

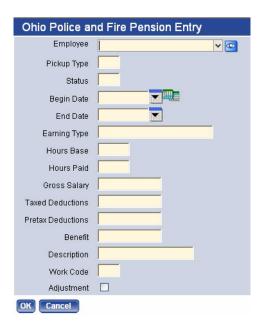
Table 2.23 "Ohio Police and Fire Pension List" Command Buttons

Button	Description
New	This button opens the "Ohio Police and Fire Pension" page in ADD mode with cursor focus in the Employee 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 "Print Ohio Police and Fire Pension" popup page.



Ohio Police and Fire Pension

The "Ohio Police and Fire Pension" page, accessed by clicking the **New** command button or the *Earning Type* hyperlink in the Employee grid on the "Ohio Police and Fire Pension List" page, enables authorized users to add an employee to the pension list or to maintain an employee already on the list.



Entry Control Descriptions

Table 2.24 "Ohio Police and Fire Pension" Controls

Table 2:24 Office and Fire Forbion Controls				
Control	Description			
Employee	This control is required. Select the employee for whom you will create the Ohio Police and Fire entry. This control is disabled in EDIT mode.			
Plckup Type	This control is required. Enter the one-character type number provided by the Ohio Police and Fire Pension Board.			
Status	This control is required. It identifies pensionable earnings for each earnings type. PEN (Pensionable) is the default value, but it can be overwritten.			
Begin Date	This control is required. Enter the pay period start date.			
End Date	This control is required. Enter the pay period end date.			
Earning Type	This control is required. It identifies the type of payroll earnings being reported. NOTE: the type of payroll earnings must be Pensionable. It may contain 1 character; options are 0-9 and A-E.			
Hours Base	This control is required. Enter the employee's base hours for the date range specified. Acceptable range is 0 through 9999.99.			
Hours Paid	The number of hours for which the employee was paid in the date range specified. Maximum value is 9999.99.			
Gross Salary	This control is required. Enter the employee's gross wages paid for the selected earning type. Acceptable values are -0.01 through 99,999.99.			



Table 2.24 "Ohio Police and Fire Pension" Controls (continued)

Control	Description
Taxed Deductions	This control is required. Enter the employee's deductions that are subject to tax. Acceptable values are -0.01 through 99,999.99.
Pretax Deductions	This control is required. Enter the employee's deductions that are taken before taxes. Acceptable values are -0.01 through 99,999.99.
Benefits	This control is required. Enter the amount of benefits paid to this employee in the date range specified. Acceptable values are -0.01 through 99,999.99.
Description	This control allows the employer or division to add a note about the record being submitted (e.g., why an employee is short of full service credit for a given month). It may contain 50 characters.
Work Code	This control indicates whether the member is new (N), retired (R), deceased (D), or has quit (Q). It may contain 1 character. If it is populated for one record for the employee, it must be populated on all records for the employee.
Adjustment	Select this box if this entry represents an adjustment.

Command Buttons

Table 2.25 "Ohio Police and Fire Pension" Command Buttons

Button	Description
ОК	Adds or updates the information in the pension data table, closes the popup, and returns the user to the "Ohio Police and Fire Pension List" page.
Cancel	Clears the entry controls without saving and data or changes, closes the popup, and returns the user to the "Ohio Police and Fire Pension List" page.



Print Ohio Police and Fire Pension

The "Print Ohio Police and Fire Pension" page, accessed from the Human Resources menu (Human Resources> State Requirements> OH> Police and Fire Pension Report) or by clicking the Print button on the "Ohio Police and Fire Pension List" page, enables authorized users to produce the Ohio Police and Fire Pension report.



Entry Control Descriptions

Table 2.26 "Print Ohio Police and Fire Pension" Controls

Control	Description
Load Saved Report	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.
Override Report Title	This control displays the title that will replace the default title on the printed report.
Print Ohio Police and Fire Pension	This section header organizes the controls that determine the data that will appear on the print output.
Division Code	The code that identifies the division for the employer submitting the report. It may contain 5 characters.
Division Name	The name of the police or fire division for which the report should be run. It may contain 60 characters.
Pay Period Begin Date	The first date of the reporting period.
Pay Period End Date	The last date of the reporting period.
Agreement Code	This code is assigned by Ohio Police and Fire. It identifies which agreement (contract) the employer/division is reporting under. It may contain 5 characters.

Command Buttons

Table 2.27 "Print Ohio Police and Fire Pension" Command Buttons

Button	Description
Print	This button automatically sends the "Ohio Police and Fire Pension" to myReports and creates a transmittal file.
Reset	Clears the entry controls and places the cursor focus in the <i>Employee</i> control.

Table 2.27 "Print Ohio Police and Fire Pension" Command Buttons (continued)

Button	Description
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>Employee</i> control. Hidden if user does not have appropriate security permissions.
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>Employee</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>Employee</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 "Print Ohio Police and Fire Pension" page, the report provides users with information about employee pension contributions. Use this report as a guide for preparing the Ohio Police and Fire Pension Report. Data on the report is sorted by *Name*. It provides sub-totals by employee, as well as grand totals. A sample report appears below.

			New World Sys				
		Ohio Police and Fire Pension Report Pay Period Begin Date: 01/01/2005 - Pay Period End Date: 03/31/2005					
SSN	Name	Earning Type	Hours Paid	Gross Salary	Pretax	Taxable	Benefit
939-01-7455	Armstrong, Benjamin	1	72	\$777.28	\$65.72	\$149.88	#0.00
Employee Totals:		1	72	10000000	\$149.88		\$0.00
Employee otals: 939-47-5833	Barr, Mark		12	\$777.28	\$149.88	\$65.72	\$0.00
ese-47-0033	Dan, Malk	1	163.54	\$2,720.72	\$335.68	\$284.76	\$0.00
Employee Totals:			163.54	\$2,720.72	\$284.76	\$335.68	\$0.00
939-25-7411	Bennett, Charles		103.54	φ2,720.72	φ204.70	g550.00	\$0.00
909-20-7-411	Dennea, Chanes	1	211.54	\$3,371,98	\$323.02	\$299.76	\$0.00
Employee Totals:		50	211.54	\$3,371.98	\$299.76	\$323.02	\$0.00
939-00-7222	Bower, James		211.01	\$2,011.00	,	,	Ψ0.00
		1	204.54	\$3,262,05	\$323.02	\$0.00	\$0.00
Employee Totals:			204.54	\$3,262.05	\$0.00	\$323.02	\$0.00
939-73-6455	Bridgeforth, Zachariah						
		1	156.5	\$3,260.48	\$0.00	\$299.76	\$0.00
Employee Totals:			156.5	\$3,260.48	\$299.76	\$0.00	\$0.00
939-06-4299	Carlen, Daniel						
		1	211.54	\$4,124.40	\$416.95	\$0.00	\$0.00
Employee Totals:			211.54	\$4,124.40	\$0.00	\$416.95	\$0.00
939-64-7444	Cassady, Frank						
		1	209.54	\$3,339.87	\$322.43	\$0.00	\$0.00
Employee Totals:			209.54	\$3,339.87	\$0.00	\$322.43	\$0.00
39-28-7488	Conley, Kirby						
		113	211.54	\$3,504.08	\$334.02	\$299.76	\$0.00
Employee Totals:			211.54	\$3,504.08	\$299.76	\$334.02	\$0.00
939-07-4299	Delgadillo, James						
		1	105.77	\$1,927.68	\$585.47	\$0.00	\$0.00
Employee Totals:			105.77	\$1,927.68	\$0.00	\$585.47	\$0.00



Report Fields

Table 2.28 "Print Ohio Police and Fire Pension" Fields

Column	Description
Social Security Number	This column displays the employee's Social Security Number.
Name	This column displays the employee's full name.
Earning Type	This column displays the one-character code that represents the earning type.
Hours Paid	The number of hours for which the employee was paid in the date range specified.
Gross Salary	This column displays the employee's gross wages paid for the selected earning type.
Pretax	This column displays the employee's deductions that are taken before taxes as applies to this earning type.
Taxable	This column displays the employee's total deductions that are subject to tax as applies to this earning type.
Benefit	This column displays the amount of benefits paid to this employee as applies to this earning type.

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 "Reports" in Chapter 2.



Saving Report Settings

Use this procedure to save report settings for future use.

- 1 From the **Human Resources** > **State Requirements** > **OH** > [Report Name] menu, select the report for which you want to save report settings. The report page displays.
- 2 Complete the controls for the report you selected as detailed in Chapter 2, "Reports."
- 3 Click the **Save** button to automatically save changes to an existing report template.

-OR-

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



- **4** Enter a unique name for the report template in the *Please enter a new report criteria name* control.
- 5 Click OK.

The report settings are now saved for future use. For more information on loading a save report, please refer to the "Loading a Saved Report" topic.



Loading a Saved Report

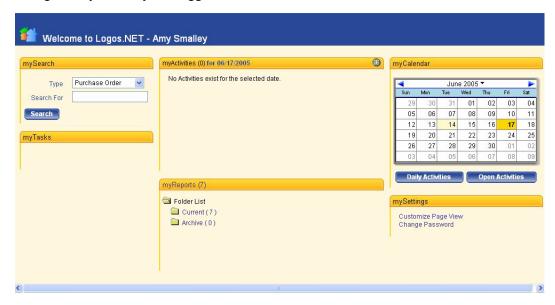
Use this procedure to load saved settings for the selected report.

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

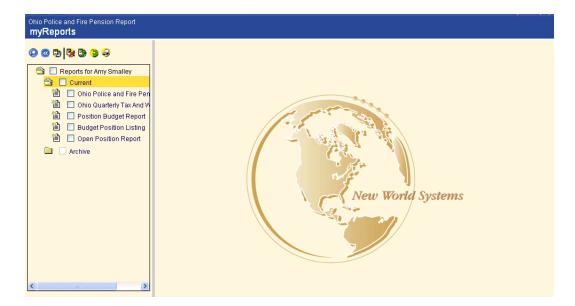


Printing a Report

The **myReports** feature on the dashboard displays folders that hold all reports that are waiting to be printed by the logged-in user.

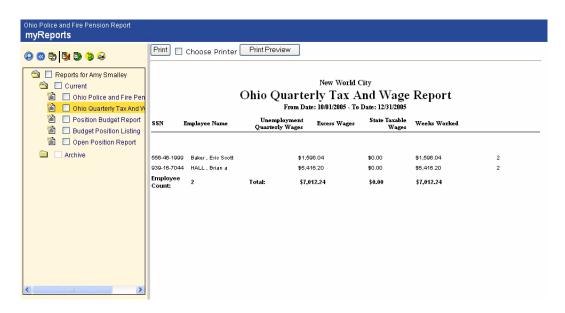


When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:





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.

Procedures

Printing a Report

