

Oregon State Requirements

Training/User Guide

Revised: 06/07/11



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Overview

This manual provides instructions for the setup and use of the Oregon State Requirements reports:

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- **2** "Form 132 Setup" p. 39
- 3 "OQ Quarterly Tax Report Setup" p. 42
- 4 "Create Oregon Retirement System Data" p. 43
- 5 "Oregon Retirement System List" p. 44
- 6 "Oregon PERS Report" p. 49
- 7 "Oregon OQ Quarterly Tax Report" p. 51
- 8 "Oregon Schedule B Report" p. 55
- 9 "Oregon Form 132 Employee Detail Report" p. 57



Oregon State Requirements

A new calculation method for SUTA tax has been added to the Oregon State Requirements. The Oregon Workers' Benefit Fund (WBF) Assessment is calculated as a rate per hour worked. The tax is divided equally between the employee and employer.

A check box has been added to the SUTA tax type to indicate whether the tax is calculated as the entered rate multiplied by the number of hours worked. The hours used in the calculation are flagged as taxable for SUTA to accommodate hours that may not be taxable. The multiplier on the hours code is ignored for this tax.

Also, the effective tax rate is selected based on the payroll check date, not the pay ending date.

You will define the hours that are eligible for this tax and assign a tax code to those hours.

PERS Setup

The "Oregon PERS Report" requires the setup of 11 user-defined fields: four in *Employee Maintenance*, three in *Deductions Maintenance*, three in *Benefits Maintenance* and one in *Hours Codes Maintenance*. These fields accommodate employee contributions made through payroll deductions.

Employee Maintenance

One section header, three user-defined employee validation-set fields, one user-defined employee date field and one user-defined employee text field need to be set up for the "Oregon PERS Report." The user-defined fields will be grouped under the section header on the Employee User-Defined page in *Employee Maintenance*:

Section Header

OR PERS

Validation-Set Fields

- OR PERS Job Code
- OR PERS FTE Hours Code
- OR PERS Avg OT Hours Code



User-Defined Text Field

OR PERS Site Code

User-Defined Date Field

OR PERS Job Code Effective Date

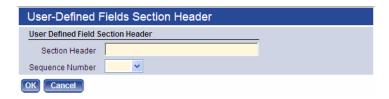
Employee Maintenance Section Header

To set up the section header that will group the user-defined employee 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. (If you are using *Workforce Administration*, select *Employee Employment*.)
- **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:

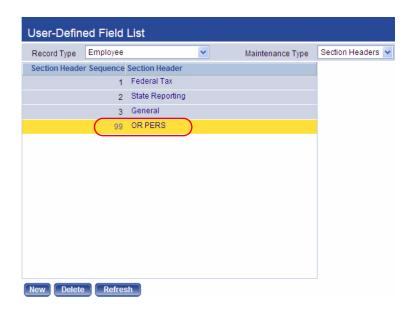


4 Click New. The User-Defined Fields Section Header popup will open:





- 5 For Section Header, type **OR PERS**. (The user-defined fields that you will create for the "Oregon PERS Report" will be grouped under this header on the Employee User-Defined page in Employee Maintenance or, if you are using Workforce Administration, on the Employment tab.)
- 6 Use the Sequence Number field to tell where you want the **OR PERS** section of user-defined fields to appear in relation to other sections on the Employee User-Defined page in Employee Maintenance or the Employment tab in Workforce Administration; for example, if the page already contains three sections (sequence numbers 1 through 3), and you want the **OR PERS** section to appear below those sections, 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 appear at the bottom of the page, select 99.
- 7 Click on The popup will be closed, and the grid on User-Defined Field List page will be refreshed to show the newly added **OR PERS** section header:



Employee Maintenance Validation-Set Fields

To set up the user-defined validation-set fields that will be part of the **OR PERS** section on the Employee User-Defined page in *Employee Maintenance* or the Employment tab in *Workforce Administration* 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. (If you are using *Workforce Administration*, select *Employee Employment*.)

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



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



5 Complete the fields *exactly* as shown in the following table:

Field	Value
Name	OR PERS Job Code
Section Header	OR PERS
Sequence Number	1
Data Type	Validation Set
Validation Set	OR PERS Job Code
Required	(Leave this check box unchecked.)

6 Click 🚾



Repeat steps four through six for the two remaining validation-set fields that need to be set up. The following tables contain the entries you will need to make:

Field	Value
Name	OR PERS FTE Hours Code
Section Header	OR PERS
Sequence Number	2
Data Type	Validation Set
Validation Set	OR PERS FTE Hours Code
Required	(Leave this check box unchecked.)

Field	Value
Name	OR PERS Avg OT Hours Code
Section Header	OR PERS
Sequence Number	3
Data Type	Validation Set
Validation Set	OR PERS Avg OT Hours Code
Required	(Leave this check box unchecked.)

Employee Maintenance Text Field

To set up the user-defined text field that will be part of the **OR PERS** section on the Employee User-Defined page in *Employee Maintenance* or the Employment tab in *Workforce Administration*, repeat steps four through six, completing the field **exactly** as shown in the following table:

Field	Value
Name	OR PERS Site Code
Section Header	OR PERS
Sequence Number	4
Data Type	Text
Maximum Length	15
Required	(Leave this check box unchecked.)



Employee Maintenance Date Field

To set up the user-defined date field that will be part of the **OR PERS** section on the Employee User-Defined page in *Employee Maintenance* or the Employment tab in *Workforce Administration*, repeat steps four through six, completing the field **exactly** as shown in the following table:

Field	Value
Name	OR PERS Job Code Effective Date
Section Header	OR PERS
Sequence Number	(Leave this field blank.)
Data Type	Date/Time
Required	(Leave this check box unchecked.)

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



Employee Maintenance Validation-Set Values

To comply with the formatting requirements of the state transmittal file, values in the *OR PERS Job Code*, *OR PERS FTE Hours Code* and *OR PERS Avg OT Hours Code* fields must be expressed precisely; therefore, the validation sets for these fields must have values set up for use by the "Oregon PERS Report."

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OR PERS Job Code Values

To set up validation-set values for *OR PERS Job Code*, follow these steps:

- 1 Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
- **2** Highlight the validation set, *OR PERS Job Code*:



- 3 Click Values. The Validation Set Values List page for OR PERS Job Code will open.
- 4 Click [New]. The Validation Set Value page will open:



- In the *Value* field, type the following, <u>exactly</u> as shown below:01
- **6** In the *Description* field, type *General Service*, 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 code information being sent to the state; therefore, take care to enter each **Value** exactly as shown in these instructions.

- 7 Click SaveNew. 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
02	Police and Fire
04	TIAA/CREF
05	Judge Member
06	Legislator
07	TFRA
08	Elected Official
09	School Employee

When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:





OR PERS FTE Hours Code Values

To set up validation-set values for *OR FTE Hours Code*, follow these steps:

- 1 On the Validation Set List page, highlight the validation set, *OR PERS FTE Hours Code*.
- **2** Click Values. The Validation Set Values List page for *OR PERS FTE Hours Code* will open.
- **3** Click New. The Validation Set Value page will open.
- 4 In the *Value* field, type the following, <u>exactly</u> as shown below: 100
- 5 In the *Description* field, type **1,000** *Hours*, or any entry that makes it easy for you to identify the *Value*. This entry is not required to comply with a predetermined wording.



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

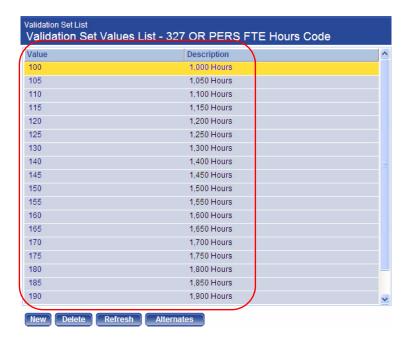
- 6 Click SaveNew. Your entries will be saved and cleared, and the Validation Set Value page will remain open for the entry of a new value.
- 7 Repeat steps four through six for the remaining validation-set values that need to be set up, clicking save after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
105	1,050 Hours
110	1,100 Hours
115	1,150 Hours
120	1,200 Hours
125	1,250 Hours
130	1,300 Hours
140	1,400 Hours
145	1,450 Hours
150	1,500 Hours
155	1,550 Hours



Value	Description
160	1,600 Hours
165	1,650 Hours
170	1,700 Hours
175	1,750 Hours
180	1,800 Hours
185	1,850 Hours
190	1,900 Hours
195	1,950 Hours
200	2,000 Hours

8 When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:



OR PERS Avg OT Hours Code Values

To set up validation-set values for *OR PERS Avg OT Hours Code*, follow these steps:

- 1 On the Validation Set List page, highlight the validation set, *OR PERS Avg OT Hours Code*.
- 2 Click Values. The Validation Set Values List page for OR PERS Avg OT Hours Code will open.
- 3 Click New. The Validation Set Value page will open.



- 4 In the *Value* field, type the following, exactly as shown below:0
- In the *Description* field, type **0** *Hours*, or any entry that makes it easy for you to identify the *Value*. This entry is not required to comply with a predetermined wording.



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

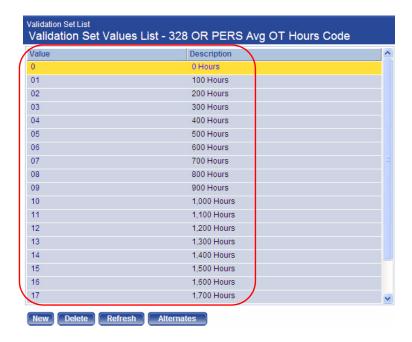
- 6 Click SaveNew. Your entries will be saved and cleared, and the Validation Set Value page will remain open for the entry of a new value.
- 7 Repeat steps four through six for the remaining validation-set values that need to be set up, clicking save after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
01	100 Hours
02	200 Hours
03	300 Hours
04	400 Hours
05	500 Hours
06	600 Hours
07	700 Hours
08	800 Hours
09	900 Hours
10	1,000 Hours
11	1,100 Hours
12	1,200 Hours
13	1,300 Hours
14	1,400 Hours
15	1,500 Hours
16	1,600 Hours
17	1,700 Hours
18	1,800 Hours



Value	Description
19	1,900 Hours
20	2,000 Hours

8 When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:

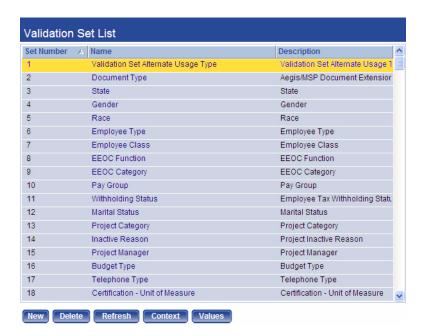


Set up *NWS Employee Status Event* Validation Set and Alternate Values

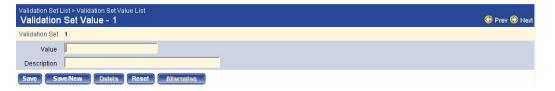
To comply with the formatting requirements of the state transmittal file, the existing employee status events must be expressed precisely; therefore, an alternate-usage validation set and associated values for employee status events must be set up for use by the "OR PERS Report." To do so, follow, follow these steps:

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





- 2 Highlight the validation set, Validation Set Alternate Usage Type.
- 3 Click Values. The Validation Set Values List page for Validation Set Alternate Usage Type will open.
- 4 Click New. The Validation Set Value page will open:



- 5 In the Value field, type the following, exactly as shown below: NWS Employee Status Event
- **6** Type a *Description* for the *Value*. This entry may be anything that makes it easy for you to identify the *Value*.



7 To save this alternate-usage validation set, click Save. The grid on the Validation Set Values List page should be updated to contain a row for NWS Employee Status Event:



- 8 Next, you will need to define alternate values for the employee status reasons you use. Return to the Validation Set List page, and highlight the validation set, *Employee Status Event*.
- 9 Click Values. The Validation Set Values List page for *Employee Status Event* will open. This page will contain a grid of the employee status reasons you have set up:





- **10** Highlight the row containing the employee status reason of new hire.
- 11 Click Alternates. The Alternate Value List page for new hire will open:





- **12** Click **Mew**. The Alternate Value popup will open.
- **13** From the *Usage Type* dropdown, select *NWS Employee Status Event* (the alternate-usage validation set you just created).
- 14 Type the *Value* exactly as shown below:01
- **15** A *Description* is optional:



- **16** Click **OK**. The alternate value of **01** will be associated with the employee status reason of new hire.
- **17** Return to the Validation Set Values List page, and repeat steps 10 through 15 **for each employee status event that you use**, typing each *Value* exactly as shown in the following table:

Employee Status Reason	Value
Rehire (Retiree)	01
At Will (Voluntary)	02
Cause (Involuntary)	02
FL (Family Leave)	03
CDL (Career Development Leave)	04
RTS (Return to school)	04
ML (Military Leave)	05
LL (Legislator Leave)	06
LOA (Leave w/o Pay)	07
RFL (Return from Leave)	08
SLA (Seasonal Leave of Absence)	09
Deceased	10
Rehire - Limits (Retiree with hours limits)	11
Rehire - No Limits (Retiree w/o hours limits)	12
Rehire - Retiree (Retiree rehire)	13

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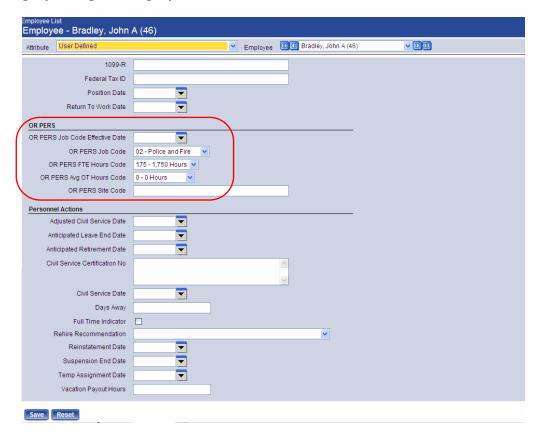


Set up Employee for Retirement System Reporting

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. (If you are using *Workforce Administration*, navigate to **Human Resources** > **Workforce Administration** > **Search**.)
- **2** Use the search controls to produce a grid containing the employee you want to set up for retirement system reporting.
- **3** Click the *Employee Number* link. The Employee page will open.
- 4 From the Attribute dropdown, select **User Defined**. (In Workforce Administration, click the Employment tab.) The page will be refreshed to show existing user-defined fields, including an **OR PERS** section containing the three validation-set fields and the text field you set up earlier:

Employee Page in Employee Maintenance



- **5** Make any entries that apply for the employee selected.
- 6 When you are finished, click Swe.



7 Where applicable, repeat these steps for each employee who will be included in the retirement system reporting.

Deductions and Benefits

Two identical section headers, three deduction check boxes and two benefit check boxes need to be set up for the "Oregon PERS Report." The deduction check boxes will appear under one section header on the Deduction Code User-Defined Fields page in *Deductions Maintenance*, and the benefit check boxes will appear under the other section header on the Benefit Code User-Defined Fields page in *Benefits Maintenance*.

Section Header

OR PERS

Deduction Check Boxes

- OR MPPT Contribution
- OR MPAT Contribution
- OR Unit Contribution

Benefit Check Boxes

- OR EPPT Contribution
- OR EOMP Contribution

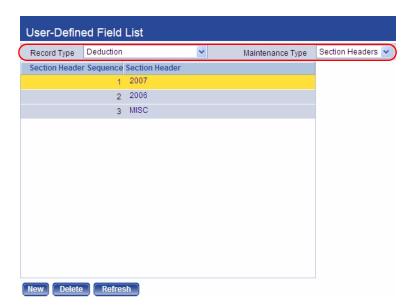
Deduction Section Header

To set up the header for the section that will contain the user-defined deduction check boxes, follow these steps:

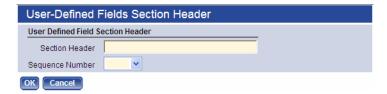
- 1 Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
- **2** Select *Deduction* from the *Record Type* dropdown.



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



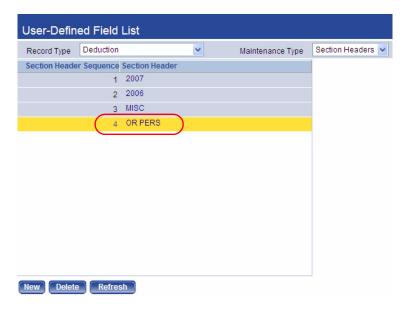
4 Click New. The User-Defined Fields Section Header popup will open:



- 5 For Section Header, type OR PERS. (The user-defined deduction check boxes that you will create for the "Oregon PERS Report" will appear under this header on the Deduction Code User-Defined Fields page in Deductions Maintenance.)
- 6 Use the Sequence Number field to tell where you want the **OR PERS** section to appear in relation to other sections on the Deduction Code User-Defined Fields page in Deductions Maintenance; for example, if the Deduction Code User-Defined Fields page already contains three sections (sequence numbers 1 through 3), and you want the **OR PERS** section to appear below those sections, 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 appear 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 **OR PERS** section header:



Deduction Section Header

To set up the section header for the Benefit User-Defined Fields page in *Benefits Maintenance*, follow the previous steps 1-7, substituting *Benefit* for *Deduction* as the *Record Type* (step 2).

Deduction Check Boxes

To set up the user-defined deduction check boxes that will appear under the **OR PERS** section header on the Deduction Codes User-Defined Fields page in *Deduction Maintenance*, follow these steps:

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





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



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

Field	Value
Name	OR MPPT Contribution
Section Header	OR PERS
Sequence Number	1
Data Type	Check Box

6 Click OK

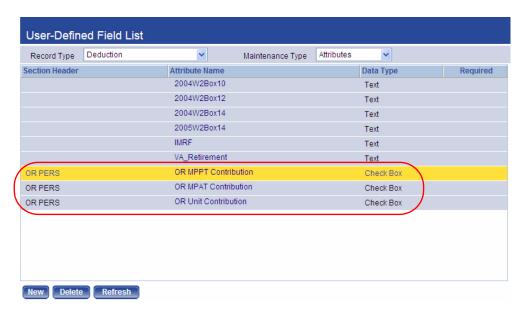


Repeat steps four through six for the two remaining deduction check boxes that need to be set up. The following tables contain the entries you will need to make:

Field	Value
Name	OR MPAT Contribution
Section Header	OR PERS
Sequence Number	2
Data Type	Check Box

Field	Value
Name	OR Unit Contribution
Section Header	OR PERS
Sequence Number	3
Data Type	Check Box

When you are finished, the *Deduction Attributes* grid on the User-Defined Field List page should contain a row for each user-defined deduction check box you have saved as part of the **OR PERS** section:



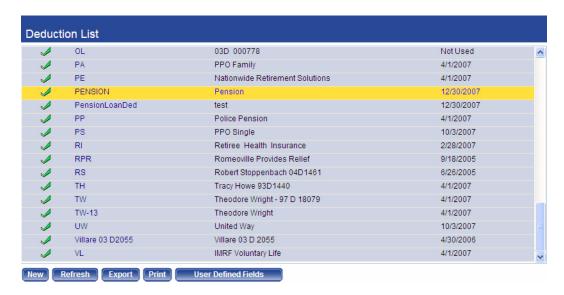
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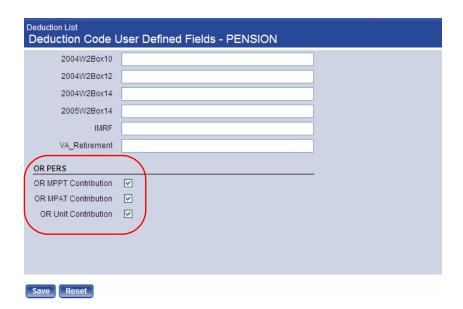
Assign User-Defined Check Boxes to Deductions

To assign the user-defined check boxes to deductions, follow these steps:

1 Navigate to Maintenance > Human Resources > Deductions and Benefits > Deductions. The Deduction List page will open:



- **2** Highlight a deduction.
- 3 Click User Defined Fields. The Deduction Code User Defined Fields page for the selected deduction will open:



4 Under the **OR PERS** section header, check each box that will apply to the selected deduction.



- 5 Click Save.
- **6** Repeat these steps for all appropriate deductions.

Benefit Check Boxes

To set up the user-defined benefit check boxes that will appear under the **OR PERS** section header on the Benefit Codes User-Defined Fields page in *Benefits Maintenance*, follow these steps:

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



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



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

Field	Value
Name	OR EPPT Contribution
Section Header	OR PERS
Sequence Number	1
Data Type	Check Box

6 Click OK

Repeat steps four through six for the remaining benefit check box that needs to be set up. The following table contains the entries you will need to make:

Field	Value
Name	OR EOMP Contribution
Section Header	OR PERS
Sequence Number	2
Data Type	Check Box

When you are finished, the *Benefit Attributes* grid on the User-Defined Field List page should contain a row for each user-defined benefit check box you have saved as part of the **OR PERS** section:

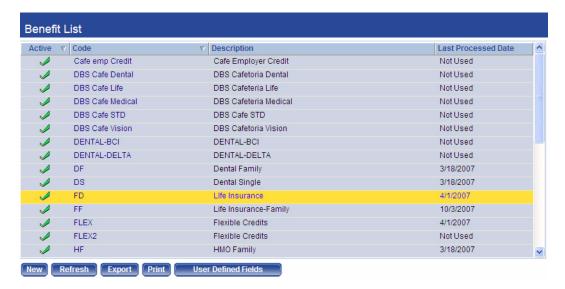




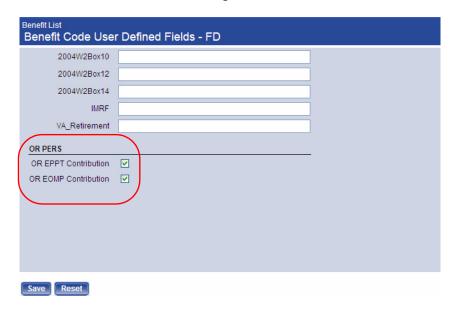
Assign User-Defined Check Boxes to Benefits

To assign the user-defined check boxes to benefits, follow these steps:

1 Navigate to Maintenance > Human Resources > Deductions and Benefits > Benefits. The Benefit List page will open:



- 2 Highlight a benefit.
- 3 Click User Defined Fields . The Benefit Code User Defined Fields page for the selected benefit will open:



- 4 Under the **OR PERS** section header, check each box that will apply to the selected benefit.
- 5 Click Save.



6 Repeat these steps for all appropriate benefits.

Hours Code

One section header and one hours code validation set need to be set up for the "Oregon PERS Report." The hours code validation set will appear under the section header on the Hours Code User-Defined Fields page in *Earnings Maintenance*.

Section Header

OR PERS

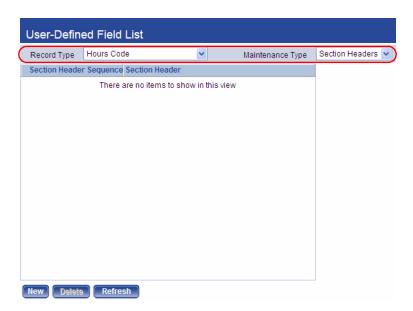
Hours Code Validation Set

OR PERS Category

Hours Code Section Header

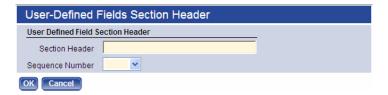
To set up the header for the section that will contain the user-defined hours code validation set, follow these steps:

- 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 be refreshed to show a grid of existing user-defined hours code section headers:

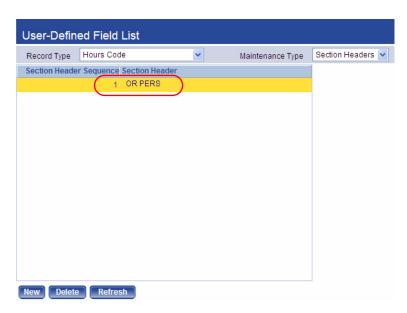


4 Click New. The User-Defined Fields Section Header popup will open:





- **5** For *Section Header*, type *OR PERS*. (The user-defined hours code validation set that you will create for the "Oregon PERS Report" will appear 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 **OR PERS** 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 **OR PERS** section to appear below those sections, 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 appear at the bottom of the page, select 99.
- 7 Click OR. The popup will be closed, and the grid on User-Defined Field List page will be refreshed to show the newly added **OR PERS** section header:





Hours Code Validation Set

To set up the user-defined hours code validation set that will appear under the **OR PERS** section header 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 be refreshed to show a grid of existing user-defined hours codes:



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





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

Field	Value
Name	OR PERS Category
Section Header	OR PERS
Sequence Number	1
Data Type	Validation Set
Validation Set	OR PERS Payment Category
Required	(Leave this check box unchecked.)

6 Click OK.

The *Hours Code* grid on the User-Defined Field List page should contain a row for the hours code validation set you have saved as part of the **OR PERS** section:

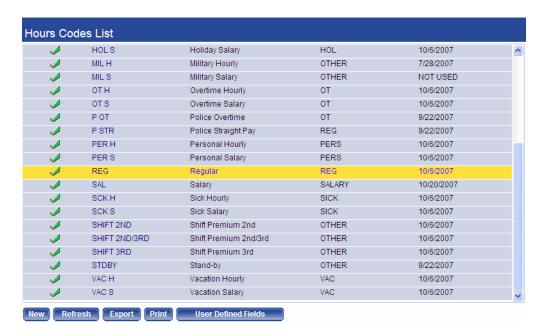


Assign User-Defined Hours Code to Hours Codes

To assign the user-defined hours code to hours codes, 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 User Defined Fields . The Hours Code User Defined Fields page for the selected hours code will open:



- **4** Under the **OR PERS** section header, select the *OR PERS Category* that will apply to the selected hours code.
- 5 Click Save.
- **6** Repeat these steps for all appropriate hours codes.



PERS Category Values

To comply with the formatting requirements of the state transmittal file, values in the *OR PERS Category* field must be expressed precisely; therefore, the validation sets for these fields must have values set up for use by the "Oregon PERS Report."

To set up validation-set values for *OR PERS Category*, follow these steps:

- 1 Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
- 2 Highlight the validation set, OR PERS Payment Category:



- 3 Click Values. The Validation Set Values List page for OR PERS Payment Category 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:

1



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

A NOTE:

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

- 7 Click SaveNew. 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 was after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
2	Subject Salary, Overtime
3	Non-Subject Salary
4	Lump Sum Payoff
5	Lump Sum Vacation Payoff

When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:





Wage Code Values

To comply with the formatting requirements of the state transmittal file, values in the *Wage Code* field on the Oregon Wage and Service page must be expressed precisely; therefore, the validation set for this field must have values set up for use by the "Oregon PERS Report."

To set up validation-set values for the *Wage Code* field on the Oregon Wage and Service page, follow these steps:

- 1 Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
- **2** Highlight the validation set, *OR PERS Wage Code*:





- 3 Click Values. The Validation Set Values List page for OR PERS Wage Code will open.
- 4 Click New. The Validation Set Value page will open:



- In the *Value* field, type the following, <u>exactly</u> as shown below:01
- 6 In the *Description* field, type *Regular Wages*, 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 wage code information being sent to the state; therefore, take care to enter each **Value** exactly as shown in these instructions.

7 Click SaveNew. 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
02	Regular / Non-Qualifying
04	Retroactive payment
05	Positive Adjustment
06	Negative Adjustment
07	Retired / No Contributions
08	Contributions / No Service
11	USERRA Qualifying Wages
14	Negative Adjustment / No Contributions
16	Negative Adjustment / USERRA Wages

When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:



Status Code Values

To comply with the formatting requirements of the state transmittal file, values in the *Status Code* field on the Oregon Demographic Entry page must be expressed precisely; therefore, the validation set for this fields must have values set up for use by the "Oregon PERS Report."



To set up validation-set values for the *Status Code* field on the Oregon Demographic Entry page, follow these steps:

- 1 Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
- **2** Highlight the validation set, *OR PERS Status Code*.
- 3 Click Values. The Validation Set Values List page for OR PERS Status Code will open.
- 4 Click New. The Validation Set Value page will open.
- In the *Value* field, type the following, exactly as shown below:00
- **6** In the *Description* field, type *No change in status*, or any entry that makes it easy for you to identify the *Value*. This entry is not required to comply with a predetermined wording.

A NOTE:

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

- 7 Click SaveNew. 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
01	New Hire
02	Terminated
03	On Family Leave
04	On Career Development Leave
05	On Military Leave
06	On Legislator Leave
07	On Leave of Absence
08	Return from Leave



Value	Description
09	Seasonal Leave of Absence
10	Deceased
11	Retiree New Hire with Hr Limit
12	Retiree New Hire wlo Hr Limit
13	New Hire - Retire Return to Service

When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved:



Form 132 Setup

The "Oregon Form 132 Employee Detail Report" requires the setup of security rights and one user-defined check box, OR Unemployment Insurance, in Hours Codes Maintenance.

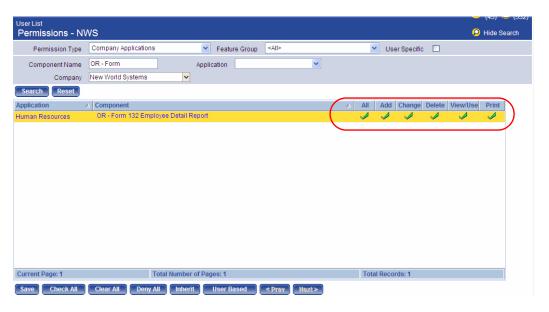
Security

To assign user rights to the Form 132 security component, follow these steps:

- 1 Navigate to **Maintenance > Logos Suite > Security > Users**. The User List page will open.
- **2** Select (highlight) the user who will be given rights to the report.
- **3** Click Permissions . The Permissions page for the selected user will open, showing a grid of application components.
- 4 Click the *Show Search* link in the top-right corner of the page. The *Component Name*, *Application* and *Company Name* search controls will display.



- 5 In the Component Name control, type OR Form.
- 6 Click Search. The grid will refresh to show only the OR Form 132 Employee Detail Report.
- 7 Check the appropriate processes to which the user will be assigned:



- 8 Click Save.
- **9** For the authorization to take effect, the user will need to sign off and sign on the system.

Hours Code Check Box

To set up the *OR Unemployment Insurance* check box that will appear under the **OR PERS** section header 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 be refreshed to show a grid of existing user-defined hours codes.
- 4 Click New. The User-Defined Fields popup will open.
- **5** Complete the fields **exactly** as follows:



Field	Value
Name	OR Unemployment Insurance
Section Header	OR PERS
Sequence Number	2
Data Type	Check Box

6 Click ok.

The *Hours Code* grid on the User-Defined Field List page should contain a row for the hours code check box you have saved as part of the **OR PERS** section.

Assign User-Defined Hours Code to Hours Codes

To assign OR Unemployment Insurance to applicable hours codes, 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 User Defined Fields . The Hours Code User Defined Fields page for the selected hours code will open.



- **4** Under the **OR PERS** section header, check the *OR Unemployment Insurance* check box.
- 5 Click Save.
- **6** Repeat these steps for all appropriate hours codes.



OQ Quarterly Tax Report Setup

The "Oregon OQ Quarterly Tax Report" requires the setup of two user-defined check boxes in *Hours Codes Maintenance*: OR Tri-Met and OR Lane Transit District. These check boxes will appear under the **OR PERS** section header on the Hours Code User-Defined Fields page in Earnings Maintenance.

- 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 be refreshed to show a grid of existing user-defined hours codes.
- 4 Click New. The User-Defined Fields popup will open.
- **5** Complete the fields **exactly** as follows:

Field	Value
Name	OR Tri-Met
Section Header	OR PERS
Sequence Number	3
Data Type	Check Box

6 Click OK.

Repeat steps four through six for the *OR Lane Transit District* check box that needs to be set up. The following table contains the entries you will need to make:

Field	Value
Name	OR Lane Transit District
Section Header	OR PERS
Sequence Number	4
Data Type	Check Box

When you are finished, the *Hours Code Attributes* grid on the User-Defined Field List page should contain a row for each user-defined check box you have saved as part of the **OR PERS** section.



Assign User-Defined Hours Code to Hours Codes

To assign OR Tri-Met and OR Lane Transit District to applicable hours codes, 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 User Defined Fields . The Hours Code User Defined Fields page for the selected hours code will open.



- **4** Under the **OR PERS** section header, check the applicable check box(es).
- 5 Click Save.
- **6** Repeat these steps for all appropriate hours codes.

Create Oregon 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 "Oregon PERS Report." This data 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 > OR > Create Retirement Data:

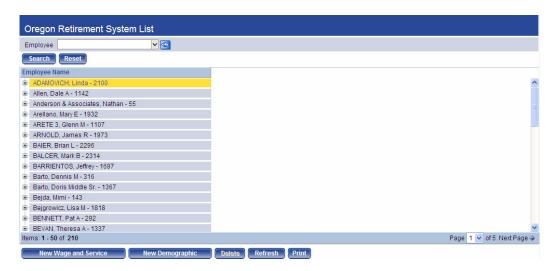




- 2 The *From Check Date* and *To Check Date* controls require entries. Select the first and last check dates that will be included in the report data.
 - Employee name changes will be pulled into a work file if the effective dates of the names are changed between these dates. Address changes also will be pulled into the file if the effective dates of the primary addresses are changed between these dates.
 - From each employee's Employee Maintenance-Personal page, any *Status Reason* associated with an *NWS Employee Status Reason* alternate code and with a *Status Date* that falls within the reporting period also will be pulled into the work file.
- When you click Submit, 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 Accept. The current retirement system data will populate the work file, and the Retirement System List page will open (see next section).

Oregon Retirement System List

The Oregon Retirement System List page lets you review and modify retirement system data for each employee within the organization. After you create the data (see previous section, "Create Oregon Retirement System Data"), this page is opened automatically. You also may open this page by going to Human Resources > State Requirements > OR > Retirement System List:



Data results are listed in a multi-level grid, sorted alphabetically by $Employee\ Name$. The first level of the grid displays the $Employee\ Name$. If applicable, subsequent levels display the employee's demographic and wage changes. To view subsequent levels, click the plus sign \blacksquare next to an employee name:

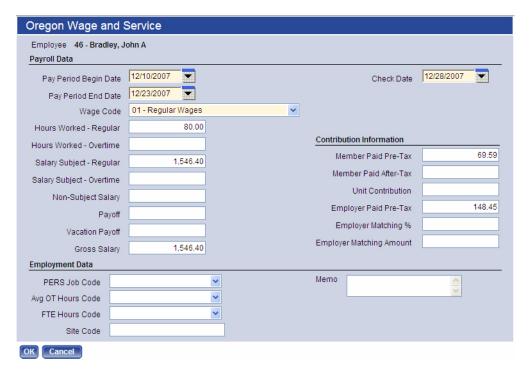




If you want to search the list for a particular employee, select the employee's name in the *Employee* control, and click Search. The grid will be refreshed to include that employee only. To change the grid to include all employees, clear the *Employee* control, and click Search.

Add and Edit Wage Information

1 If you need to add wage information for an employee, select the employee in the list, and click New Wage and Service; if you need to edit wage information, click the hyperlinked *Type*. In both cases, the Oregon Wage and Service popup will open:





Field	Description
Employee	Required. Employee for whom transaction information will be added or edited.
Payroll Data	
Pay Period Begin Date	Required. Pay period to which hours and wages will be allocated.
Pay Period End Date	
Wage Code	Required. Tells EDX how to treat the reported wage and contribution amounts.
Check Date	Required.
Hours Worked-Regu- lar	Total non-overtime hours a member worked.
Hours Worked-Over- time	Total overtime hours a member worked.
Salary Sub- ject-Regular	Excluding overtime pay and amounts expressly considered non-subject to PERS contributions, salary paid to the employee on the given pay date.
Salary Sub- ject-Overtime	Excluding regular pay and amounts expressly considered non-subject to PERS contributions, salary paid to the employee on the given pay date for hours above the regular Salary Subject-Regular.
Non-Subject Salary	Salary excluded from PERS and OPSRP contributions, e.g., a check issued for expense reimbursement.
Payoff	Lump-sum payments made to the employee for various reasons such as accrued compensatory time, severance pay for involuntary termination (except retirement severance), or bonuses (except retirement bonus).
Vacation Pay- off	Lump-sum vacation payoff payment made to the employee for accrued vacation and accrued paid leave only.



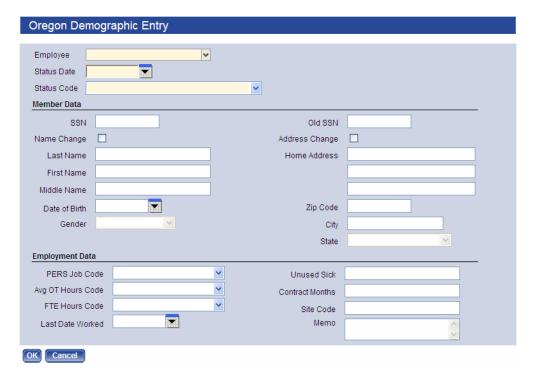
Field	Description
Gross Salary	Gross salary paid on the given pay date. This field must equal the sum of the values entered in the following: Salary Subject-Regular, Salary Subject-Overtime, Non-Subject Salary, Payoff and Vacation Payoff.
Contribution 1	Information
Member Paid Pre-Tax	IAP contributions paid by the employee, which, if entered, must equal 6 percent of total subject salaries.
Member Paid After-Tax	IAP contributions paid by the employee, which, if entered, must equal 6 percent of total subject salaries.
Unit Contri- bution	Voluntary member contributions made by police-class or firefighter-class employees who submit a unit election under ORS 238.440.
Employer Paid Pre-Tax	IAP contributions paid by employers, which, if entered, must equal 6 percent of subject salaries.
Employer Matching %	Optional employer contribution to member IAP accounts in addition to required member contributions. The contribution may not be less than 1 percent or more than 6 percent of the total subject salary.
Employer Matching Amount	Dollar amount of optional IAP contributions indicated by the percentage listed in the field above.
Employment I	Data
PERS Job Code	Job class code under which a person is hired. Required only if <i>01</i> or <i>13</i> is entered for the status code.
Avg OT Hours Code	If <i>PERS Job Code</i> contains a value, the code for the number of annual overtime hours considered average/reasonable for the employee's new job class.
FTE Hours Code	If 09 is entered for <i>PERS Job Code</i> and 01 or 13 for the status code, the number of hours per year an employee in his or her job class must work to be considered as having performed a full year of service.

3 After completing your entries, click on to save them.



Add and Edit Member Demographic Information

To add employee demographic information for the period being reported, click New Demographic; to edit demographic information for an employee, click the hyperlinked *Demographic Change* in the grid. In both cases, the Oregon Demographic Entry popup will open:



- **2** Make entries in the appropriate fields.
- **3** After completing your entries, click on to save them.

NOTE:

Make changes here before making them in Employee Maintenance or Workforce Administration. Changes here will not be made automatically in Employee Maintenance or Workforce Administration.



Oregon PERS Report

The following steps show you how to generate the "Oregon PERS Report":

1 From the Oregon Retirement System List page, click Print, or Navigate to Human Resources > State Requirements > OR > Retirement System Report:



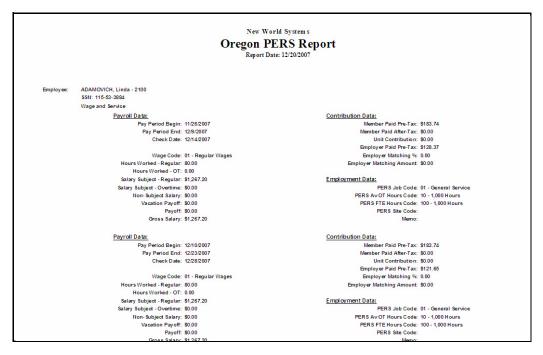
Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click [Save], a popup will ask you to name the report. Type the name, and
	click . The next time you want to run this report, select its name from the Load Saved Report dropdown, and the fields 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 of the report ("Oregon Retirement System Report").
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . 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 <i>myReports</i> for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your <i>Human Resources User Guide</i> .)
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



Field	Description
Employer Code	Required. State-assigned code identifying the employer.
Report Date	Required.
Create Trans- mittal File	Determines whether a transmittal file will be generated with the report. Check this box to generate the file.

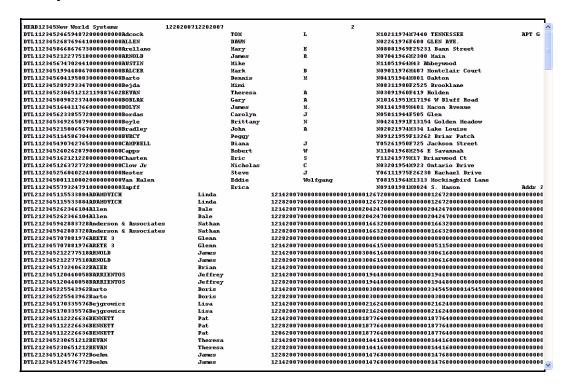
3 After making your entries, click **Print** to generate the report and submit it to *myReports*. If you checked the *Create Transmittal File* box, a transmittal file of the report data also will be sent to *myReports*.

Sample "Oregon PERS Report"





Sample Transmittal File



Oregon OQ Quarterly Tax Report

The following steps show you how to generate the "Oregon OQ Quarterly Tax Report":

Navigate to Human Resources > State Requirements > OR > OQ Quarterly Tax Report:





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 . The next time you want to run this report, select its name from the <i>Load Saved</i>
	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	Overrides the default title of the report ("Ore-
Report Title	gon OQ Quarterly Tax Report").



Field	Description
Distribution	A group of people selected to receive the report
Group	in <i>myReports</i> . 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 <i>Human Resources User Guide</i> .)
Email Group	A group of people selected to receive the report
Етин Өгөир	
	by e-mail. Click the dropdown prompt verto select the group. To create a new e-mail group,
	click 1.
Quarter	Required. Identifies the fiscal quarter being
Q min ter	reported. The available selections are 1, 2, 3 and
	4.
Year	Required. Identifies the year of the fiscal quar-
	ter being reported. Type all four digits of the
	year.
UI Taxable	Required. Minimum amount of annual wages
Wage Base	that are taxable for unemployment insurance.
UI Penalty and Interest Owed	Required.
	Required. Name of the person who prepared the
Preparer Name	report.
Phone Number	Required. Phone number of the person who pre-
Thorac I variable	pared the report.
Extension	If applicable, phone extension number of the
	person who prepared the report.
Unemployment	Required. Unemployment insurance tax per-
Insurance	centage rate minus prepaid taxes amount, if
	applicable. If the percentage is five, for exam-
	ple, type 5. As soon as you press the <tab></tab> key or click outside the control, the entry will be
	formatted as a standard percentage with five
	decimal places (5.00000%). If the percentage is
	5.12, the entry will be formatted as 5.12000%.
State Withhold-	Required. State withholding prepaid taxes.
ing	
Tri-met	Required. Tri-met tax percentage rate minus
	prepaid taxes amount, if applicable.



Field	Description
	Required. Lane Transit District tax percentage rate minus prepaid taxes amount, if applicable.
	Required. Workers' Benefit Fund Assessment percentage minus prepaid taxes amount, if applicable.

- **3** Select one or more benefit groups from the *Available Benefit Group(s)* multi-select list box.
 - 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.
- 4 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.
 - Treturns all benefit groups to the Available Benefit Group(s) box.
- **5** After making your entries, click **Print** to generate the report and submit it to *myReports*.



Sample "Oregon OQ Quarterly Tax Report"

#Covered Workers for Unemployment Ins.Tex	Month 1 2	Month 2 1	Month 3 1	Tota
	Unemployment	State Taxes	Tri-Met	Lane Transi
1. Subject Wages	Column A 45.457,29	Column B 15.101.13	Column C 30,304,88	Column (30,304.8
Subject Wages Excess Wages	45,457.29 45,457.29	15,101.13	30,304.80	30,304.60
Taxable Wages	40,407.29			
4. Tax Rate	5.00000		0.000000	0.000000
5. Total Tax	227.288.45	453.03	0.000000	0.000000
6. Prepaid Taxes	0.00	0.00	0.00	0.00
7. Penalty and Interest	0.00	0.00	0.00	0.0
8. Total Tax Due	227,288,45	453.03	0.00	0.00
10. WBF Assessment Rate 11. Total Assessment 12. Prepaid Assesment 13. Total Assesment Due	0.000000 0.00 0.00 0.00			
14. Total Payment Due	227,739.48			
Monthly Summary of State Withholding Tax	258.03	195.00	0.00	453.03
Prepared By	George Taylor			
Phone	(111) 222-3333 - 0			

Oregon Schedule B Report

The following steps show you how to generate the "Oregon Schedule B Report":

1 Navigate to Human Resources > State Requirements > OR > Schedule B Report:



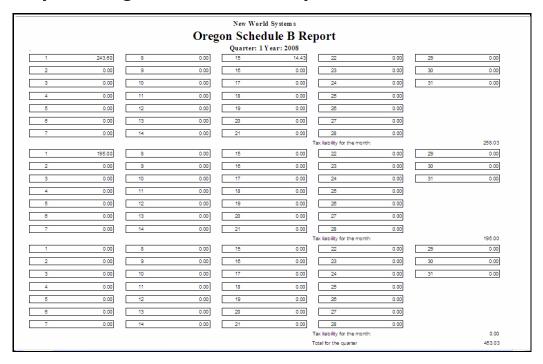


Field	Description
Load Saved Report	Saves this version of the report as a template for later use. When you click we a popup will ask you to name the report. Type the name, and click we . The next time you want to run this report, select its name from the <i>Load Saved Report</i> dropdown, and the fields 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 of the report ("Oregon Schedule B Report").
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . 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 <i>myReports</i> for each person in the group. (For more information about this control, refer to the "Common Controls" appendix of your <i>Human Resources User Guide</i> .)
Email Group	A group of people selected to receive the report by e-mail. Click the dropdown prompt vo select the group. To create a new e-mail group, click .
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.

- **3** Select one or more hour codes from the *Available Benefit Code*(*s*) tab. (For instructions on how to make selections, see steps 3 and 4 of the "Oregon OQ Quarterly Tax Report" section.)
- **4** After making your entries, click **Print** to generate the report and submit it to *myReports*.



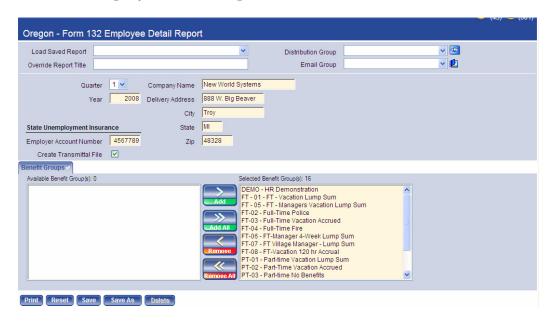
Sample "Oregon Schedule B Report"



Oregon Form 132 Employee Detail Report

The following steps show you how to generate the "Oregon Form 132 Employee Detail Report":

1 Navigate to Human Resources > State Requirements > OR > Form 132 Employee Detail Report:





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 or. The next time you want to run this report, select its name from the <i>Load Saved Report</i> 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 of the report ("Oregon Form 132 Employee Detail Report").
Distribution Group	A group of people selected to receive the report in <i>myReports</i> . Click the dropdown prompt
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 .
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.
Company Name	Required.
Delivery Address	Required. Number and street name, or first line, of company's delivery address.
City	Required. City of company's deliver address.
State	Required. State abbreviation of company's delivery address.
Zip	Required. Postal zip code of company's delivery address.



Field	Description		
State Unemployment Insurance			
Employer Account Num- ber	Required. State-assigned employer account number.		
Create Trans- mittal File	Determines whether a transmittal file will be generated with the report. Check this box to generate the file.		

- **3** Select one or more hour codes from the *Available Benefit Code(s)* tab. (For instructions on how to make selections, see steps 3 and 4 of the "Oregon OQ Quarterly Tax Report" section.)
- 4 After making your entries, click Print to generate the report and submit it to *myReports*. If you checked the *Create Transmittal File* box, a transmittal file of the report data also will be sent to *myReports*.

Sample "Form 132 Employee Detail Report"

	O E	New World Systems		
	Oregon - F	orm 132 Employee Detail R	eport	
		Quarter: 1 Year: 2008		
Employee	SSN	Address	Hours Worked	Gross Amor
Aerial Images, SHAUN E 1782	342-91-4942	312 FREMONT, Troy, MI - 48084	1,000.00	8,120
Agnew, CRYSTAL A - 2545	165-88-5936	626 SUPERIOR DRIVE, Troy, MI - 48084	1,000.00	6,500
FER FEC KI, Pat A - 292	185-80-5881	19382 W John Kirkham, TROY, MI - 48098	16.00	386
Employee Count: 3	To	otal:	\$2,016.00	\$15,006

Sample Transmittal File

RE2008					
RS41	342914942SHAUN	E	Rerial Images	312 FREMONT	Troy
RS41	165885936CRYSTAL	A	Agnew	626 SUPERIOR DRIVE	Troy
RS41	185605681Pat	A	FERFECKI	19362 W John Kirkham	TROY

Last Revised: June 7, 2011 59 Logos.NET 5.2

