

# Wisconsin 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 Wisconsin State Requirement Reports.

1 "Wisconsin State Requirements Setup" on page 1-2 provides step-by-step information for the set up of the Wisconsin Retirement System Report. Setup must be completed before running this report.



## Wisconsin State Requirements Setup

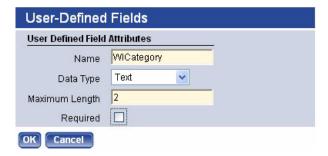
The Wisconsin Retirement System Report requires that deductions and benefits fields are set up in User-Defined Fields. These fields accommodate contributions that are made from employees, in the form of payroll deductions, or employers, in the form of benefits. Then category codes must be added to the deduction and benefit fields. Contributions depend on the plan to which the employee belongs.

#### **Setting Up Employees**

Three **employee** user-defined fields need to be set up for the Wisconsin Retirement System Report:

#### **WICategory**

- 1 From the Maintenance menu, select Logos Suite > Security > User-Defined Fields. The "User-Defined Field List" page displays.
- 2 Select Employee from the **Record Type** control. (Workforce Administration users should select Employee Employment.)
- 3 Click the New button. The "User-Defined Fields" popup displays.



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

Table 1.1

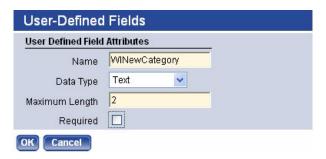
Control	Value
Name	WICategory
Data Type	Text
Maximum Length	2
Required	Unselected

5 Click OK.



#### **WINewCategory**

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



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

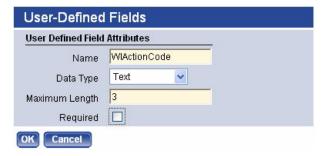
Table 1.2

Control	Value
Name	WINewCategory
Data Type	Text
Maximum Length	2
Required	Unselected

3 Click OK.

#### **WIActionCode**

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



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

Table 1.3

Control	Value
Name	WIActionCode
Data Type	Text
Maximum Length	3
Required	Unselected

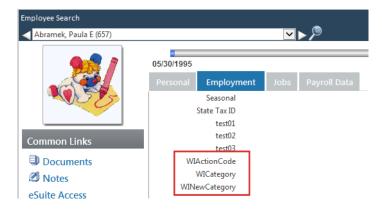
This control is required for terminated employees.



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



Workforce Administration users will see the same information on the Employment tab:



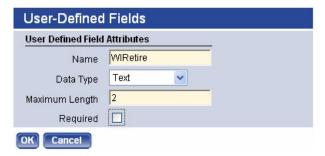
#### **Setting Up Deductions**

To set up deduction user-defined fields for the Wisconsin Retirement System 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 1.4

Control	Value
Name	WIRetire
Data Type	Text
Maximum Length	2
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 for which you want to set up a category code.
- 3 Click the User Defined Fields button. The "Deduction Code User Defined Fields" page displays.





4 Referring to the table below, enter the appropriate value of the category code you want to set up for the deduction:

Table 1.5

Code	Value
Required Deduction	R
Adjustments	Α
Fixed Additional	F
Variable Additional V	
Tax Deferred Fixed	TF
Tax Deferred Variable	TV

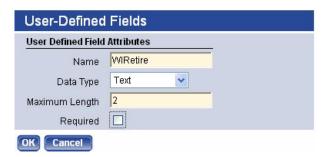
- 5 Click Save.
- **6** Repeat steps 2-5 for the remainder of the deductions for which you want to set up category codes.



#### **Setting Up Benefits**

To set up benefit user-defined fields for the Wisconsin Retirement System Report:

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



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

Table 1.6

Control	Value
Name	WIRetire
Data Type	Text
Maximum Length	2
Required	Unselected

5 Click OK.

To set up category codes for benefits:

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



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



4 Referring to the table below, enter the appropriate value of the category code you want to set up for the benefit:

Table 1.7

Code	Value
Required Benefit	R
Adjustments A	
Fixed Additional F	
Variable Additional V	
Tax Deferred Fixed TF	
Tax Deferred Variable TV	

- 5 Click Save.
- 6 Repeat steps 2-5 for the remainder of the benefits for which you want to set up category codes.

# CHAPTER

# **REPORTS**

#### **Overview**

This chapter provides detailed window and field information for Wisconsin state requirement reports. Use these reports as guides for state remittances. For more information about these remittances, please refer to the following Web site:

? <a href="http://www.wisconsin.gov/state/home">http://www.wisconsin.gov/state/home</a>

## 🧷 NOTE:

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

1 "Wisconsin Retirement System Report" on page 2-2 allows authorized users to select the information that appears on the Wisconsin Retirement System Report and submit it to myReports.



## Wisconsin Retirement System Report

The "Wisconsin Retirement System Report" page, accessed from the Human Resources menu (Human Resources > State Requirements > WI > Retirement System Report), enables authorized users to select the information that appears on the Wisconsin Retirement System Report and submit it to myReports. For a description of the procedures that can be performed on this page, please refer to Chapter 3, "Procedures."



### **Entry Control Descriptions**

Table 2.1 "Wisconsin Retirement System 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   Stored
Override Report Title	This control contains the title that will replace the default title. It may contain 64 characters.
Submission	This section groups submission period information for the report.
From Date	This control is required. It contains the beginning date of the date range the report data will cover.
To Date	This control is required. It contains the ending date of the date range the report data will cover.
Report Date	This control is required. It contains the date the report is run. The default entry is the <i>To Date</i> .
Report Type	This control contains the type of report that will be run. The available types are Monthly Remittance, Transaction and Additional Contributions. The default selection is Monthly Remittance.



Table 2.1 "Wisconsin Retirement System Report" Controls (continued)

Control	Description
Create Transmittal File	If the <i>Report Type</i> is Monthly Remittance, selecting this control will create the transmittal file and send it to myReports. If the <i>Report Type</i> is Monthly Remittance or Additional Contributions, this control is deselected and disabled.
Employer Identification Number	This control is required. It contains the state-assigned employer identification number. The number may contain seven digits.
Fiscal Year Start	If the <i>Report Type</i> is Transaction, this control is enabled and required. It contains the start date of the fiscal year. The default is 01/01 of the current year.
Fiscal Year End	If the Report Type is Transaction, this control is enabled and required. It contains the end date of the fiscal year. The default is 06/30 of the current year.

#### **Benefits Tab**

As the default visible tab of the "Wisconsin Retirement System Report" page, the "Benefits" tab enables users to specify the benefits to include on the report.

#### Benefits Tab Entry Control Descriptions

Table 2.2 "Wisconsin Retirement System Report" Benefits Tab Controls

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

#### **Benefits Tab Command Buttons**

Table 2.3 "Wisconsin Retirement System Report" Benefits Tab Command Buttons

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

#### **Deductions Tab Entry Control Descriptions**

Table 2.4 "Wisconsin Retirement System Report" Deductions Tab Controls

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

#### **Deductions Tab Command Buttons**

Table 2.5 "Wisconsin Retirement System Report" Deductions Tab Command Buttons

Button	Description
Add	This button moves all selected deduction codes in the Available Deduction Code(s) multi-select text-box to the Selected Deduction Code(s) multi-select textbox. If no deduction codes are listed in the Available Deduction Code(s) multi-select textbox, the Add command button is disabled.
Add All	This button moves all deduction code(s) from the Available Deduction Code(s) multi-select textbox to the Selected Deduction Code(s) multi-select textbox. If no deduction codes are listed in the Available Deduction Code(s) multi-select textbox, the Add All command button is disabled.
Remove	This button moves all selected deduction codes from the Selected Deduction Code(s) multi-select textbox to the Available Deduction Code(s) multi-select textbox. If no deduction codes are listed in the Selected Deduction Code(s) multi-select textbox, the <b>Remove</b> command button is disabled.
Remove All	This button moves all deduction codes from the Selected Deduction Code(s) multi-select textbox to the Available Deduction Code(s) multi-select textbox. If no deduction codes are listed in the Selected Deduction Code(s) multi-select textbox, the <b>Remove All</b> command button is disabled.

#### **Hours Codes Tab**

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

#### Hours Codes Tab Entry Control Descriptions

Table 2.6 "Wisconsin Retirement System Report" Hours Codes Tab Controls

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



#### **Hours Codes Tab Command Buttons**

Table 2.7 "Wisconsin Retirement System Report" Hours Codes Tab Command Buttons

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

## **Employee Statuses Tab**

The "Employee Statuses" tab enables users to specify the employee statuses to include on the report.

#### Employee Statuses Tab Entry Control Descriptions

Table 2.8 "Wisconsin Retirement System Report" Employee Statuses Tab Controls

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

#### **Employee Statuses Tab Command Buttons**

Table 2.9 "Wisconsin Retirement System Report" Employee Statuses Tab Command Buttons

Button	Description
Add	This button moves all selected employee statuses in the <i>Available Employee Status</i> multi-select text-box to the <i>Selected Employee Status</i> multi-select textbox. If no employee statuses are listed in the <i>Available Employee Status</i> multi-select textbox, the <b>Add</b> command button is disabled.
Add All	This button moves all employee statuses from the <i>Available Employee Status</i> multi-select textbox to the <i>Selected Employee Status</i> multi-select textbox. If no employee statuses are listed in the <i>Available Employee Status</i> multi-select textbox, the <b>Add All</b> command button is disabled.



 Table 2.9
 "Wisconsin Retirement System Report" Employee Statuses Tab Command Buttons (continued)

Button	Description
Remove	This button moves all selected employee statuses from the Selected Employee Status multi-select textbox to the Available Employee Status multi-select textbox. If no employee statuses are listed in the Selected Employee Status multi-select textbox, the <b>Remove</b> command button is disabled.
Remove All	This button moves all employee statuses from the Selected Employee Status multi-select textbox to the Available Employee Status multi-select textbox. If no employee statuses are listed in the Selected Employee Status multi-select textbox, the Remove All command button is disabled.

#### **Command Buttons**

Table 2.10 "Wisconsin Retirement System Report" Command Buttons

Button	Description
Print	This button automatically sends the "Wisconsin Retirement System Report" to myReports.
Reset	This button updates the page and sets the data in the controls to the state they were in when the page was last saved.
Save	If the report settings have not yet been saved, this button opens a popup page that enables the user to save the current report settings and assign a name to the settings so they can be used at a later date. When <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>From Date</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>From Date</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 <b>OK</b> is clicked, the settings are saved, the popup page is closed, and the cursor focus is placed in the <i>From Date</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 <b>OK</b> is clicked, the saved report settings are deleted, all controls are cleared, and the cursor focus is placed in the <i>From Date</i> control. This button is hidden if the user does not have the appropriate security permissions.

#### **Monthly Remittance Report Output**

Generated via the "Wisconsin Retirement System Report" page, the monthly remittance report provides users with information detailing employment earnings, employee contributions, employer contributions and total contributions for employment categories within the date range selected. A sample report appears below.

ment Earnings \$0.00	Employee Contributions	Employer Contributions	Total Contributions
\$0.00	\$0.00	#0.500.4e	
		\$3,539.16	\$0.00
\$0.00	00.0\$	\$3,539.16	00.0\$
90.00	\$0.00	\$3,539.16	!
	\$0.00	00.00	\$0.00 \$0.00 \$2,638.16



#### Report Fields

Table 2.11 "Wisconsin Retirement System Report" (Monthly Remittance) Fields

Column	Description
Employment Category	This column displays the employment category group. Groups include General, Educational and Support Personnel; Elected, Judges, Exec, Pay Plan; Protective with Social Security; Protective without Social Security; and Teachers.
Employment Earnings	This column displays the sum of earnings for selected hours codes.
Employee Contributions	This column displays the sum of deduction amounts for selected deduction codes.
Employer Contributions	This column displays the sum of benefit amounts for selected benefit codes.
Total Contributions	This column displays the sum of employee and employer contributions.

#### **Transaction Report Output**

Generated via the "Wisconsin Retirement System Report" page, the transaction report provides users with information on action codes, termination and last earnings dates, new employee codes, fiscal year hours and earnings, calendar year hours and earnings, required contributions, adjustment contributions and additional contributions for terminated employees within the date range selected. A sample report appears below.

			699							
Employee	Termination Action Code Date	Last Earnings Date	New Employee Code	Fiscal Year Hours	Fiscal Year Earings	Calendar Year Hours		Employee Required Contributions	Employee Adjust ment Contributions	Additional Contributions
Category: 00										
000-00-0000	01		00	0.0000	\$0.00	120.0000	\$871.92	\$0.00	\$0.00	X
Allen, Mary - 36										
3409 Western Ave										
MATTOON, MI48084										
Category 00 Totals: 1				0.0000	\$0.00	0	\$871.92	\$0.00	\$0.00	
Grand Totals: 1				0.0000	\$0.00	. 0	\$871.92	\$0.00	\$0.00	

#### Report Fields

Table 2.12 "Wisconsin Retirement System Report" (Transaction) Fields

Column	Description
Employee	This column displays the employee's full name, social security number and address.
Action Code	This column displays the user-defined action code for the employee.
Termination Date	This column displays the date of the employee's termination.
Last Earnings Date	This column displays the last payroll date for a terminated employee.
New Employee Code	This column displays the user-defined category code for the employee.



Table 2.12 "Wisconsin Retirement System Report" (Transaction) Fields (continued)

Column	Description
Fiscal Year Hours	This column displays the total hours for selected hours codes between the fiscal year start and end dates.
Fiscal Year Earnings	This column displays the total earnings for selected hours codes between the fiscal year start and end dates.
Calendar Year Hours	This column displays the total hours for selected hours codes between the from and to dates.
Calendar Year Earnings	This column displays the total earnings for selected hours codes between the from and to dates.
Employee Required Contributions	This column displays the total amount of required deductions for the employee.
Employee Adjustment Contributions	This column displays the total amount of adjusted deductions for the employee.
Additional Contributions	This column displays the total amount of additional deductions for the employee. Additional deductions include fixed, variable, tax deferred fixed and tax deferred variable.

#### **Additional Contributions Report Output**

Generated via the "Wisconsin Retirement System Report" page, the additional contributions report provides users with information detailing employee paid, employer paid and tax deferred contributions for employees within the date range selected. A sample report appears below.

Wisconsin Additional Contributions From Date: 01/01/2005 - To Date: 01/31/2005							
Employee	Category	Employee Paid Fixed	Employee Paid Variable	Employer Paid Fixed	Employer Paid Variable	Tax Deferred Fixed	Tax Deferred Variable
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Employee	F	From Date: 01/01/2005  Employee Paid Employee Category Fixed	From Date: 01/01/2005 - To Date: 01/31/2  Employee Paid Employee Paid Employee Paid Fixed Variable  Category Fixed Variable	From Date: 01/01/2005 - To Date: 01/31/2005  Employee Paid Employee Paid Employer Paid Employee Category Fixed Variable Fixed	From Date: 01/01/2005 - To Date: 01/31/2005  Employee Paid Employee Paid Employer Paid Employer Paid Employer Paid Employee Paid Employee Paid Employee Paid Employee Paid Employee Fixed Variable	From Date: 01/01/2005 - To Date: 01/31/2005  Employee Paid Employer Paid Employer Paid Tax Deferred Employee Category Fixed Variable Fixed Variable Fixed

## Report Fields

Table 2.13 "Wisconsin Retirement System Report" (Additional Contributions) Fields

Column	Description
SSN	This column displays the employee's social security number.
Employee	This column displays the employee's full name.
Category	This column displays the employee's employment category.
Employee Paid Fixed	This column displays the total amount of the employee's additional, fixed deductions.
Employee Paid Variable	This column displays the total amount of the employee's additional, variable deductions.
Employer Paid Fixed	This column displays the total amount of the employee's additional, fixed benefits.



Table 2.13 "Wisconsin Retirement System Report" (Additional Contributions) Fields (continued)

Column	Description
Employer Paid Variable	This column displays the amount of the employee's additional, variable benefits.
Tax Deferred Fixed	This column displays the amount of the employee's additional, tax deferred, fixed deductions.
Tax Deferred Variable	This column displays the amount of the employee's additional, tax deferred, variable deductions.

**Reports** Wisconsin Retirement System Report



# **PROCEDURES**

#### **Overview**

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

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

For information on specific reports and submitting reports, please see Chapter 2, "Reports."



## **Saving Report Settings**

Use this procedure to save report settings for future use.

- 1 From the Human Resources > State Requirements > WI > [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**

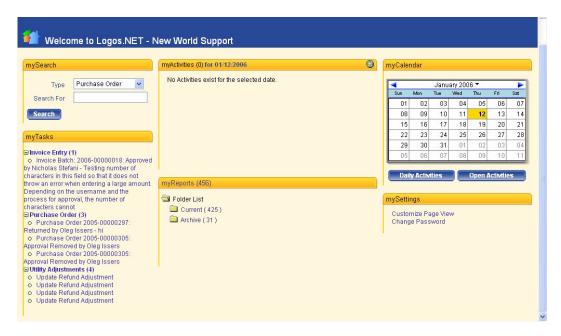
Use this procedure to load saved settings for the selected report.

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

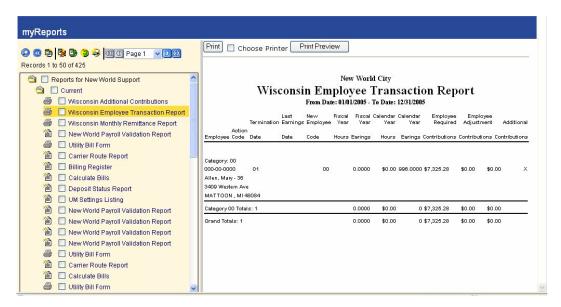


When you click on the Current hyperlink next to the folder icon, the myReports page will launch. The reports you have run will be listed on the left side of the page:





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

