With the update to the PERA Annual Exclusion Report, users will need to update PERA information for employees before creating a payroll. ***This also includes entities that do not participate in the PERA Program.***

Step 1: Go to the Admin Section, select the Edit System Information tab, enter PERA Employer ID# and save. ***Entities that do not participate in PERA can skip Step 1.***

Step 2: Select the Payroll tab (circled), then Employee icon (boxed).

Step 3: View/Edit each active employee's individual employee record. Highlight a row and select the view/edit tab (boxed) or double left click on an employee. Individual employee tab will display.

Select the Other and Employer (F5) tab (circled).

Step 4:

- If entity **does not** participate in the PERA Program select "Excluded from PERA" option from the PERA Plan Type drop down list. Select Save.

- If an entity **does** participate in PERA but the individual employee is excluded from PERA, select the "Excluded from PERA" option from the PERA Plan Type drop down list and enter the PERA Exclusion Code (boxed). Select Save.

- If entity participates in PERA and the individual employee participates in PERA, the information that was listed in the blank before upgrading is listed (circled), in order to assist in choosing the appropriate drop down option.   Select the proper plan from the drop-down list. Verify that the PERA Percentage is correct for both the employee and employer (arrows). Select Save.

Each employee will need to have their PERA information updated before a user can create a payroll.

If the user attempts to create a payroll before updating the PERA data, in the Create/Update Payroll Roster step, the user will see the following message (boxed) and the employees that have not had their PERA information updated in the drop down will appear in red:

Payroll Roster

	Unselected Employees				Employees on Payroll Roster	
Last Name	First & Middle Name	Employee #		Last Name	First & Middle Name	Employee #
1	1	0000005				
2	2	001001010				
3	3					
4	4					
5	5					
6	6					
7	7					
9	9					

Buttons: > >> < <<

Employees in Red are missing PERA Information

Save   Cancel

If this message is received, follow the steps 1-4 above. Once PERA data is entered for the employee, they will display in black and be able to be added to the payroll roster.