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.***

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Admin										7:35 AM
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*1										
" Institution Nar	ne:	Sand Creek Town	ship - Production							
*Address Line	l:	5325 Circle Dr								
Address Line2										
*City		lordan		MAN MAN	*Zin	55252-	_			
ony		Jordan			210	55552				
*Phone :		(952) 292-2774		F	ax: ()				
Email :										
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*OSA Code :		2409								
PERA Employ	er ID:	<u> -</u>	─── ←							
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					Save	Cancel				
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Step 2: Select the Payroll tab (circled), then Employee icon (boxed).

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<u>1</u>) View	v/Edit		<u>2</u>) Dele	te	3)	Export to (SV														

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).

Accounting	<u>P</u> ayroll <u>I</u> r	nvestments lj	debtedness	<u>R</u> eports	Ad <u>m</u> in	<u>E</u> xit						
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Employee Payrol	Tax											
	Tables											
Employee												7:08 AM
Employees List	Add Emplo	oyees 7 9, 9 ×										
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*First Name	9		Mi	ddle Name			*Last Name	9				
*Address Line1	9th St.		Add	Iress Line2			*City	Here				
*State	MN	*ZIP 99999-9	9999	Email			*Phone	(99	Town Supervisor			
Employee				*SSN	000-00-000	0	PERA #					
BirthDate		~		Condor		O Famala	Effective Date	01/01	/2006			
Jah Information				Gender	• Male		Effective Date	01/01	1/2000			
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Date	01/01/2006	<u> </u>			Pay Type	-	Rate	01	vertime			
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Employee Type	U run rune	. Orare nine			*							
			-									
"Pay Frequency	Monthly	~	1									
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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.

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Employee Payroll	Tax								
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Employee									7:22 AM
Employees List	Add Employees	1,1 ×							
Employee Number	0000005	Name	1 1		Active				
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Other Deductions					Employer's Share				
PERA Plan Type	<u> </u>		~	DCP	Health Insurance		\$10.00		
Perce	ntage Excluded	from PERA			Payroll Period	0: All Payroll Periods	~		
Exclusion	Code General(E Police and	Basic or Coordinated) d Fire			Dental Insurance		\$10.00		
WAR	NING - Correctio	nal Volunteer Eirefighter	the Admin s	ection	Payroll Period	0: All Payroll Periods	~		
Union Dues Amount	Defined C	Contribution Plan (DCP)	10.00		Life Insurance Amount		¢ 10.00		
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Other De testione									
1)	Туре	Child Support			Retirement Regular %	0.050(Additional %	0.010(- TOTAL	0.060(‡	
	Amount		\$10.00						
	Payroll Period	0: All Payroll Periods	~		Deduction Name	/	Payroll Period		Amount
2)	Туре	Type 2			401 K		0: All Payroll Periods		\$0.00
	Amount		\$10.00		Cafeteria		0: All Payroll Periods		\$0.00
	Payroll Period	0: All Payroll Periods	~		Deferred Income		0: All Payroll Periods		\$15.00
3)	Туре	Type 3			*				
-,	Amount		\$10.00						
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L		L							
								<u>S</u> ave Ca	incel

• 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.

Accounting Pa	yroll <u>i</u> nvestmer	nts l <u>n</u> debtedness	<u>R</u> eports Ad <u>m</u> in	<u>E</u> xit						
223	î									
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Employee										7:22 AM
Employees List	Add Employees	1, 1 ×								
Employee Number	0000005	Name	11			Active				
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Other Deductions						Employer's Share				
PERA Plan Type	I		~	DCP		Health Insurance		\$10.00		
Perce	entage	0.0500 ≑				Payroll Period	0: All Payroll Periods	~		
Exclusion	Code					Dental Insurance		\$ 10.00		
WAR	NING - The Employ	er PERA ID has not bee	n entered in the Admin	ection		Payroll Period	0: All Payroll Periods			
Union Dues Amount			10.00							
Davaell Dav	ind a sup	\$				Life Insurance Amount		\$10.00		
Payroli Per	0: All Pay	'oll Periods	~			Payroll Period	0: All Payroll Periods	~		
Other Deductions	Turne	Child Support				Retirement Regular %	0.050(Additional %	0.010(- TOTAL	0.060(‡	
1)	Amount		\$10.00							
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2)	Туре	Type 2				Deduction Name	/	Payroll Period		Amount
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3)	Type	Type 3								
	Amount Douroll Deried	Or All Devery Device de	\$10.00			Delete				
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• 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.

Accounting Payroll Investments Indebtedness Reports Admin Exit	
Employae Payroll Tay	
Tables	
Employee	7:22 AM
Employees List Add Employees 1, 1 ×	
Employee Number 0000005 Name 1 1	☑ Active
Demographics and Job (F3) Tax and Insurance (F4) Other and Employer (F5) Acct. Dist (F6) Sick, Vac	ation, Comp, ESST (F7) Official Role (F8)
Other Deductions	Employer's Share
PERA Plan Type V DCP	Health Insurance \$10.00
Percentage 0.0500	Payroll Period 0: All Payroll Periods ~
Exclusion Code	Dental Insurance \$10.00
WARNING - The Employer PERA ID has not been entered in the Admin section	Payroll Period 0: All Payroll Periods
Union Dues Amount \$ 10.00	- Life Insurance Amount
Payroll Pariod	Payroll Period
. All rayion rendus	0: All Payroll Periods
Other Deductions	Retirement Regular % 0.050(Additional % 0.010(TOTAL 0.060(-
Amount \$10.00	
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2) Type Type 2	Deduction Name Payroll Period Amount
Amount 1000	401 K 0: All Payroll Periods \$0.00
SIU.UU	Deferred Income 0: All Payroll Periods \$15.00
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3) Type 3	
Amount \$10.00	
Payroll Period 0: All Payroll Periods	Delete
	Cancel Cancel
	Save Cancer

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	5		6	mployees on Payroll	Roster	
Last Name	First & Middle Name	Employee #	1	Last Name	First & Middle Name	Empl	oyee #
1	1	0000005	1				
2	2	001001010					
3	3						
4	4						
5	5						
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7	7						
9	9						
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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.