

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.\*\*\***

Admin

System Information (F3) **Edit System Information (F4)** Year-end Processing (F5) Utilities (F6) Error Log (F7) Support (F8)

\*Institution Name: Sand Creek Township - Production

\*Address Line1: 5325 Circle Dr

Address Line2:

\*City: Jordan \*State: MN \*Zip: 55352-\_\_\_\_

\*Phone: (952) 292-2774 Fax: (\_\_\_\_) \_\_\_\_-\_\_\_\_

Email:

Federal ID Number: 41-6160422 Current Fiscal Year: 2024

State ID Number: 777777777

\*OSA Code: 2409

PERA Employer ID: \_\_\_\_-\_\_\_\_

Save Cancel

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

Accounting **Payroll** Investments In debtbedness Reports Admin Exit

Employee

Employee

Employees List Add Employees

Active Employees Only Search

Last Name	First & Middle Na	Emp. #	SSN #	PERA #	Birth Date	Active	Address Line	Address Line	City	State	Zip Code
9	9		000-00-0000			Y	9th St.		Here	MN	999999999
7	7		111-11-1111			Y	Here St.		There	MN	888888888
6	6		222-22-2222			Y	There Street 123		Here	MN	999999999
5	5		333-33-3333			Y	There St.		Here	MN	777777777
4	4		444-44-4444			Y	Home		Home	MN	444444444
3	3		555-55-5555			Y	New Street		Here	MN	888888888
1	1	0000005	111-11-1111	111111111...		Y	8 Main St.		Here	MN	000000000
2	2	001001010	123-45-6789	888888888...		Y	9 Main St.		Here	MN	444444444

1) View/Edit 2) Delete 3) Export to CSV

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).

The screenshot shows the 'Employee' form with the 'Other and Employer (F5)' tab selected and circled in red. The form includes fields for Employee Number, Name, Address, Contact Information, Job Information, and a table for Pay Type. The 'Pay Type' table has columns for Pay Type, Rate, and Overtime. The 'Other and Employer (F5)' tab is highlighted with a red circle.

Pay Type	Rate	Overtime
meeting	\$80.000	<input type="checkbox"/>
salary	\$450.000	<input type="checkbox"/>
hourly	\$20.000	<input type="checkbox"/>
*		<input type="checkbox"/>

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.

The screenshot shows the 'Employee' form with the 'PERA Plan Type' dropdown menu open. The 'Excluded from PERA' option is selected. The form also shows the 'Employer's Share' section with fields for Health Insurance, Dental Insurance, Life Insurance Amount, and Retirement. The 'PERA Plan Type' dropdown menu is open, showing options like 'Excluded from PERA', 'General(Basic or Coordinated)', 'Police and Fire', 'Correctional', 'Statewide Volunteer Firefighter', and 'Defined Contribution Plan (DCP)'. The 'Excluded from PERA' option is highlighted.

- 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.

The screenshot shows the 'Employee' form in the 'Payroll' section. The 'PERA Plan Type' dropdown is open, showing 'Percentage' set to 0.0500 and 'Exclusion Code' highlighted with a red box. A warning message is displayed: "WARNING - The Employer PERA ID has not been entered in the Admin section". The 'Employer's Share' section shows Health Insurance, Dental Insurance, and Life Insurance amounts of \$10.00 each. The 'Retirement' section shows Regular % at 0.0500, Additional % at 0.0100, and a TOTAL of 0.0600. The 'Deduction Name' table shows 'Deferred Income' with an amount of \$15.00.

- 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.

The screenshot shows the 'Employee' form in the 'Payroll' section. The 'PERA Plan Type' dropdown is open, showing 'DCP' circled in red. A red arrow points to the 'Percentage' field (0.0500). Another red arrow points to the 'Retirement' section, which shows Regular % at 0.0500, Additional % at 0.0100, and a TOTAL of 0.0600. The 'Deduction Name' table shows 'Deferred Income' with an amount of \$15.00.

**\*\*\*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				
8	8				
9	9				

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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.