



IRIS Certification



PERSI's Certification Requirements for IRIS formatted transmittals.

Introduction

In 2012, PERSI began implementing a new system called the Idaho Retirement Information System (IRIS). One goal of IRIS is to expand on the amount of data and the accuracy of the data we collect from employers. This allows for additional validations on that data, helping both you and PERSI identify possible issues before they become larger problems. A certification process has been designed to help PERSI evaluate that transmittals comply with the IRIS specifications.

IRIS Transmittal Documentation

The most recent version of the IRIS file specification can be found on PERSI's employer website (www.persi.idaho.gov/employers).

Here are the direct links to the IRIS file specification as well as documents detailing what's changed:

- [PERSI Employer Transmittal Reporting Manual](#) (The IRIS file specification, referred to as the *Employer Manual* for brevity in the remainder of this document)
- [Summary of Changes to Employer Manual](#) (Historical changes to PERSI file specifications)
- [PERSI Employer Transmittal Reporting Manual Errata](#) (Changes made since original IRIS spec release)

IRIS Certification Procedure

The certification procedure is comprised of the following steps:

- 1) Initial test files pass all Certification File Requirements
- 2) A subsequent test file must be submitted and:
 - a. Is the subsequent cycle for one of the initial test files
 - b. Passes all Certification File Requirements
- 3) A supplemental file must be submitted that passes Certification File Requirement: 1. IRIS File Format
- 4) A Rollout Plan must be coordinated with PERSI

Certification File Requirements

The following are the file requirements for certification testing. More details on what each requirement means will be provided during the certification process.

1. IRIS File Format

Demonstrate compliance with the IRIS file specification by uploading files to PERSI free of file upload errors. Once uploaded, all errors and warnings found during subsequent data validations must be addressed satisfactorily.



2. PERSI Defined Benefit Rows

Demonstrate the ability to report pensionable compensation to PERSI in both the current cycle and as non-current adjustments (NCA).

These are TM records. (contrib_source_code = T, contrib_type_code = M)

3. Invoice Payments

Demonstrate the ability to report invoice payment records to PERSI.

These are RM records. (contrib_source_code = R, contrib_type_code = M)

4. Loan Payments

Demonstrate the ability to report loan payment records to PERSI.

These are RL records. (contrib_source_code = R, contrib_type_code = L)

5. DC Contributions

Demonstrate the ability to report Choice Plan contribution records to PERSI.

These are TV records. (contrib_source_code = T, contrib_type_code = V)

6. Employer Matching Contributions

Demonstrate the ability to report employer matched Choice Plan contribution records to PERSI.

These are EV records. (contrib_source_code = E, contrib_type_code = V)

7. Working Retired Members (School Districts Only)

Demonstrate the ability to report records for Working Retired Members to PERSI in both the current cycle and as non-current adjustments (NCA).

These are PM records. (contrib_source_code = P, contrib_type_code = M)

8. ORP (ORP Plan Participants Only)

Demonstrate the ability to report Optional Retirement Plan records to PERSI in both the current cycle and as non-current adjustments (NCA).

These are OM records. (contrib_source_code = O, contrib_type_code = M)

9. Full Reporting

Full reporting requires all non PERSI eligible employees to be reported to PERSI in both the current cycle and as non-current adjustments (NCA).

These are AM records. (contrib_source_code = A, contrib_type_code = M)

10. New Hire

Demonstrate the ability to hire new employees. This would apply to TM, PM, OM, and AM record types.

11. Termination

Demonstrate the ability to terminate employees. This would apply to TM, PM, OM, and AM record types.

12. Eligibility Transitions

Demonstrate the ability to report a cycle that transitions an eligible employee into an ineligible employee and vice versa.

13. Proper Class Encoding

Demonstrate the ability to report all class types to PERSI.

14. Dual Employment

Demonstrate the ability to handle an employee that has established primary employment elsewhere under a different classification. Employers are required to withhold employee and employer contributions based on the primary employer's contribution rates.

15. Non-Normal Earning Types

Demonstrate the ability to report bonuses, sick leave usage, vacation payouts, and the "Other" earning type to PERSI.

16. Non-Pensionable Income (Sick Leave Plan Participants Only)

Demonstrate the ability to report non-pensionable income to PERSI that is eligible for sick leave contributions.

Post Certification Requirement

Once certification is complete, PERSI would like the final version number of software implemented. This is so we can keep track of issues that may arise in the future that could prompt us to work on re-certifying payroll software.