PERSI
Public Employee Retirement System of Idaho

Arrivos Employer Reporting Guide

ARRIVOS®

Revised 07/18/2018

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PERSI

Public Employee Retirement System of Idaho

Everyone is a little fearful of change, especially when it is imposed on us. You may feel uneasy about using the new Idaho Retirement Information System (Arrivos); but rest assured, you are not alone, PERSI is here for you. The purpose of this manual, with its graphic layout, is to help you become comfortable and proficient using Arrivos for your transmittal reporting to PERSI.

Transmittal reporting requires every employer to provide PERSI with accurate employee data and to apply statute consistently. In the past, the PERSI system did little to help employers with this. That will change with the Arrivos system. Arrivos will improve the quality of the data received from employers and help ensure the accuracy of member records.

Using the manual, you will become familiar with new terminology, icons, and procedures. PERSI was careful to include screen prints throughout the manual to improve your understanding of the new processes and procedures. Descriptions, whenever possible, are presented in general, non-technical terms so individuals with little or no PERSI reporting background – or technical knowledge – can quickly grasp the concepts. Although learning the new system may be daunting at first, in the end I think you will agree Arrivos will simplify your job and reduce reporting errors. To assist in your training, the Employer Service Center will continue to provide support to employers.

Thank you for your continued support of PERSI and your enthusiasm for using the new system. By completing Arrivos training, you've taken the first step to making your job a little easier.

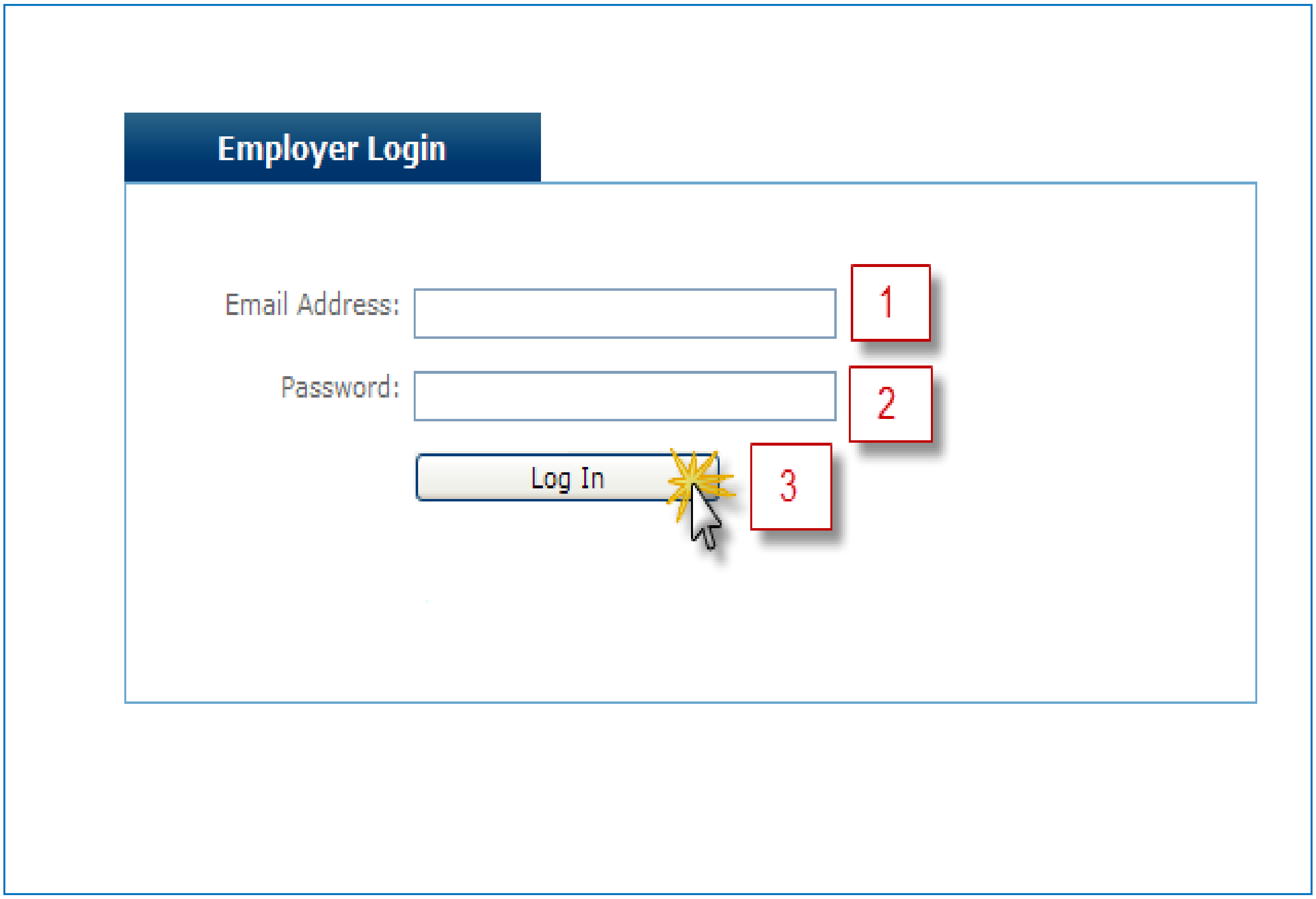
Don Drum
Executive Director
PERSI

Chapter 1: Transmittal Reporting

Logging In

The *Employer Login* screen is the first page of the Arrivos Employer Reporting website. Use the Employer Login screen to log in and access Arrivos.

To access the *Employer Login* screen, open your web browser to the following web address: https://employers.persi.idaho.gov



If you have already registered, perform the following to log in:

1. In the **Email Address** field, type your email address.
2. In the **Password** field, type your password.
3. Click **Log In**.

   ➢ The *Home* page will display.

   Note: You must have an email address and password to access Arrivos. If you have already registered, this information should be provided to you.

If you have not registered, perform the following:

1. Open the following link:

   https://www.persiweb.idaho.gov/members/registration1.cfm?fromEmployerPortal=yes.

   - The *Member Registration* screen displays.

2. Provide the requested information.
3. Click **Submit**.

If you need to modify your password, perform the following:

1. Open the following link: https://www.persiweb.idaho.gov/members/helpinfo.cfm#forgotpassword.

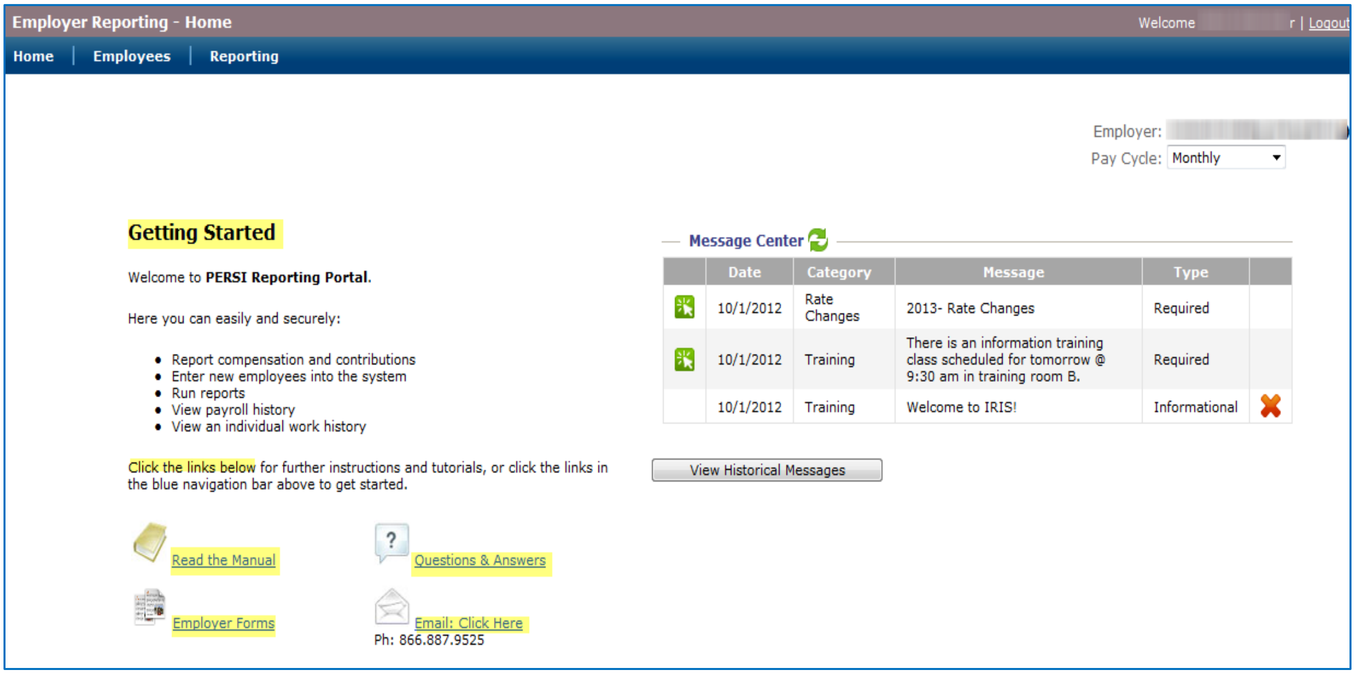
   - The *Help Page* opens to the *Your Password* section.

2. Follow the instructions under the "How do I change my password or e-mail address?" sub-section.

If you have difficulties registering or accessing your account information, please contact PERSI at http://www.persi.idaho.gov/contact.

Viewing the Home Page

After you log into Arrivos, the *Home* page serves as a welcome area and information center.

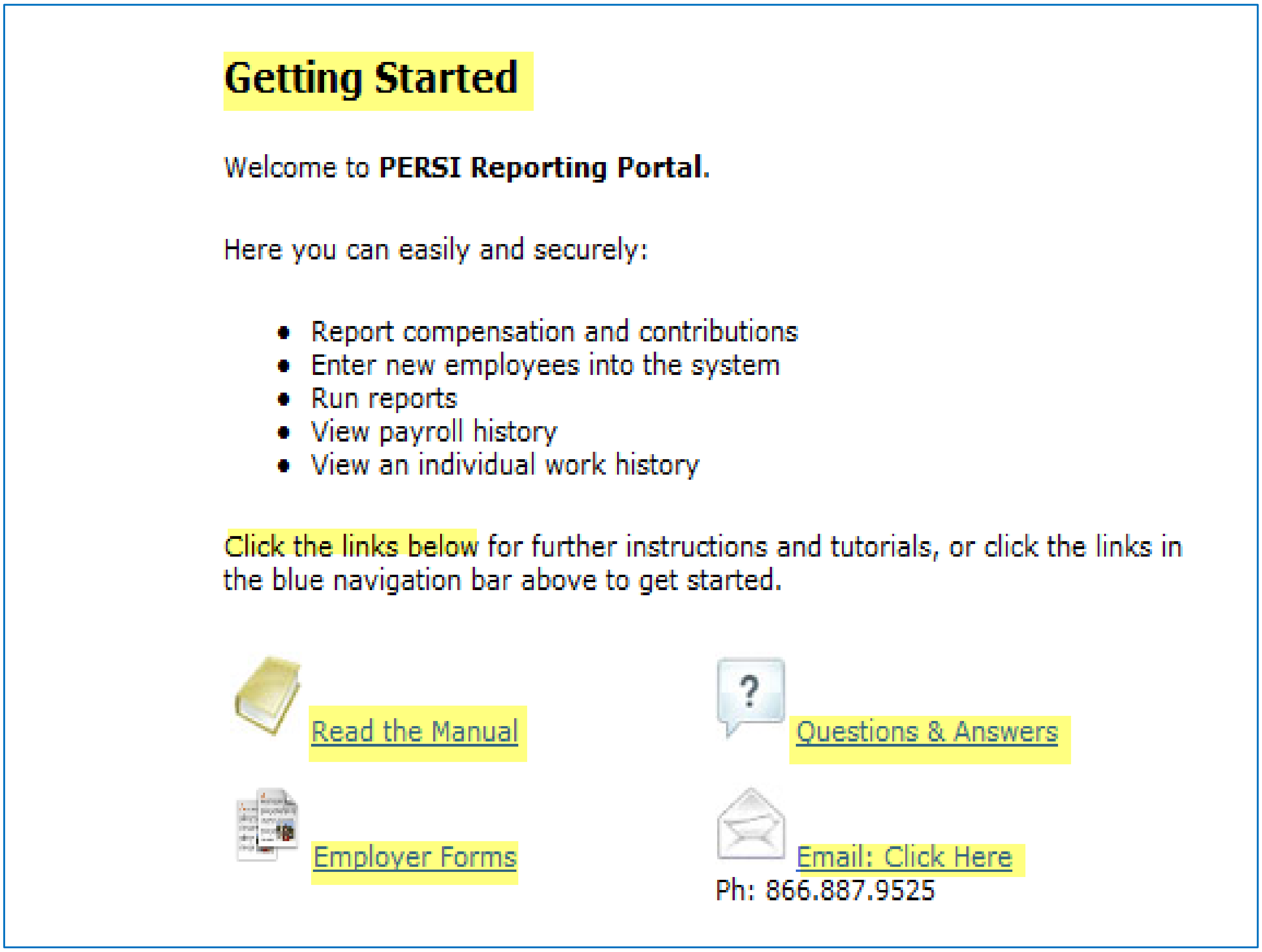


If you are responsible for reporting for multiple employers or agencies, the *Employer Search* page displays before the *Home* page. To continue to the *Home* page, select the employer and then select the appropriate pay cycle.

The *Home* page is split into two areas: *Getting Started* provides a reporting overview and several useful links while the *Message Center* displays messages from PERSI to employers like you.

Getting Started

The *Getting Started* area contains an employer reporting overview and several links with further instructions and tutorials.

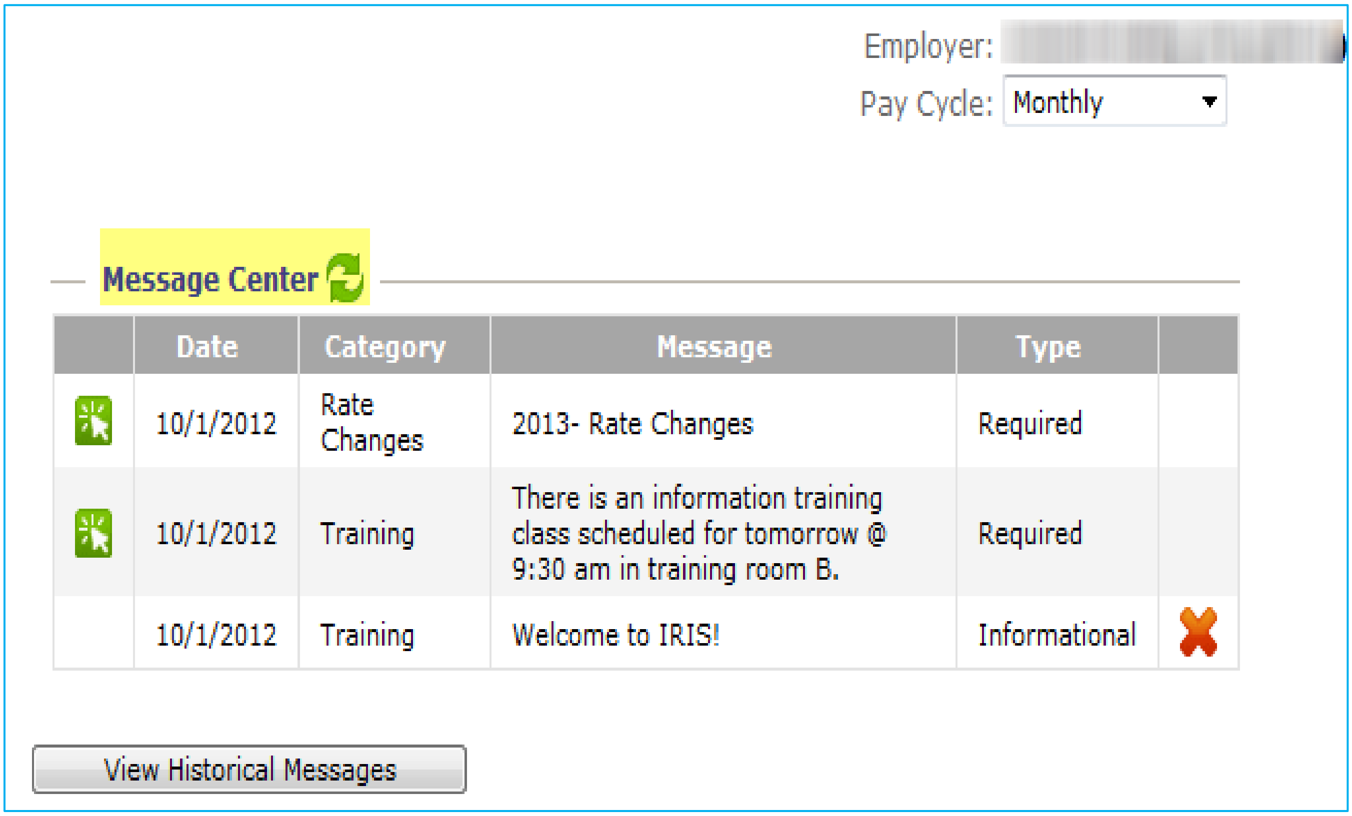


Click the desired link to perform one of the following functions:

- **Read the Manual**: Launches the *Arrivos File Specification* in a new window.
- **Questions & Answers**: Launches a window displaying Frequently Asked Questions for Arrivos.
- **Employer Forms**: Launches the PERSI site so you can access employer forms.
- **Email**: Opens or creates an email addressed to PERSI.

Reviewing the Message Center

The *Message Center* area displays a message grid with announcements and messages from PERSI.



Messages are sent with a start and end date, so a message displays in the *Message Center* if today's date is on or between the start and end date for that message. The dates shown on the grid are the start date for each message.

If a message displays "Required" in the *Type* field, you must review it before you access the rest of the Arrivos menu. To review a required message, perform the following:

1. Read the message.
2. Click the **Select** icon next to the message to acknowledge your review.
   - ➢ The **Delete** icon displays to the right of the message.
3. If desired, click **Delete** to remove the message.

   Note: Messages are not actually deleted, but available to be viewed in the *Historical Messages* page. The *Historical Messages* page is discussed in greater detail in the next section.

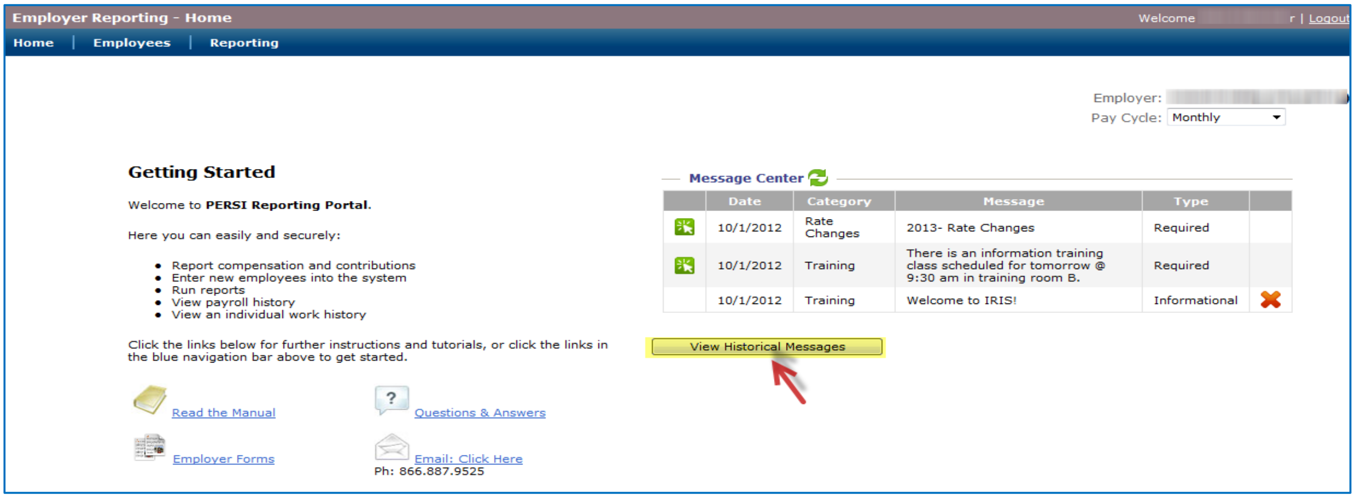
If a message displays "Informational" in the *Type* field, acknowledgement is not required.

Viewing Historical Messages

The *Historical Messages* page displays all messages that are past the message end date or that have been deleted from the *Home* page.

Note: A “Required” message must be acknowledged before you can continue.

From the *Home* page, click **View Historical Messages** to open the *Historical Messages* page.



If your target message is not displayed, you can search for a message by performing the following:

1. Type a **Start Date** or **End Date** in the *Message Filter* section.
2. Click **Filter**.

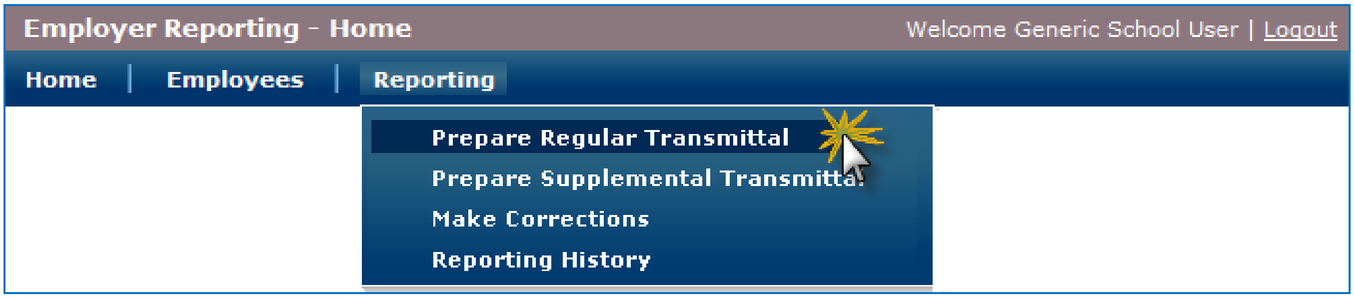
   ➢ The *Historical Messages* page restricts the messages displayed to those with the dates you entered.

   Note: To remove the filter, click **Clear Filter**.

Submitting a Regular Transmittal

To start a regular transmittal, perform the following:

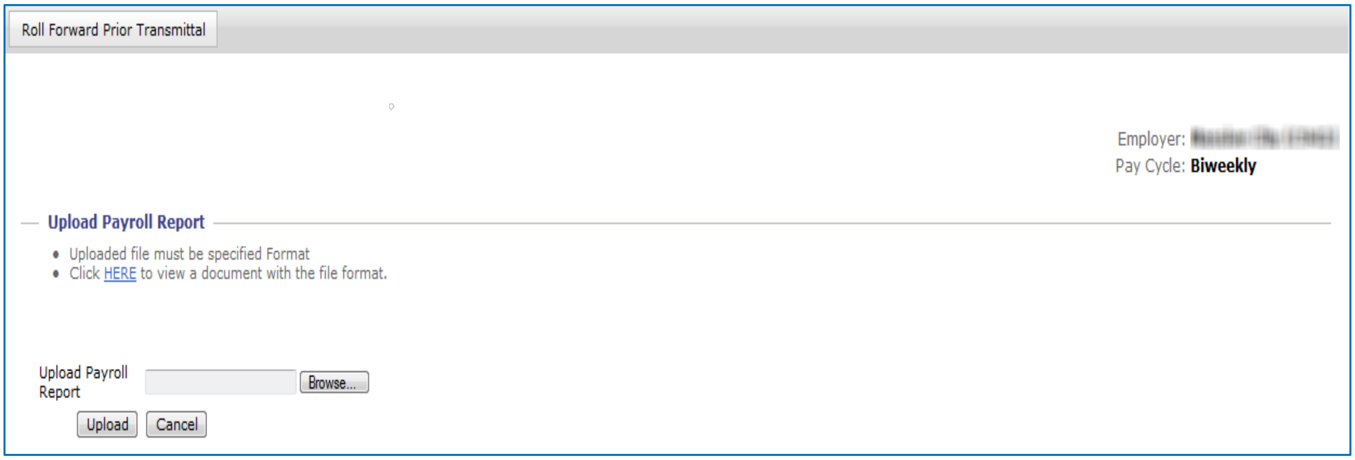
1. Click **Reporting** on the main menu**.**
2. Click **Prepare Regular Transmittal** in the sub-menu.
   - If the employer is an upload employer, the *Regular Transmittal Upload* page displays. Proceed to page 11.
   - If the employer is a roll-forward employer, the *Prepare Regular Transmittal* page displays. Proceed to page 12.



Uploading a Transmittal (Upload Employer Only)

The *Regular Transmittal Upload* page allows an upload employer to browse and upload a payroll report. Use this page to put your data into Arrivos.

Note: This page only displays when an upload employer selects **Prepare Regular Transmittal** on the main menu.



The upload requires specific criteria to be followed. These criteria are presented on the screen for your reference.

To upload your file, perform the following:

1. Click **Browse**.
   - A pop-up window displays.
2. Navigate to your payroll file.
3. Click the file to select it.
4. Click **Open**.
   - The pop-up window closes.
5. Click **Upload**.
   - If the file is not in the correct format, an error displays on the page. Correct the upload file to try uploading again.
   - If there are validation errors on the upload file, you will be taken to a page to correct the data. You can also choose to correct the file and try uploading it again.
   - If the upload is successful, the *Prepare Regular Transmittal* page displays.

   Note: To stop the upload, click **Cancel** at any point prior to clicking **Upload**.

The Arrivos website uses https, meaning that communications between the client and server are already encrypted. No additional encryptions or security are required for the upload.

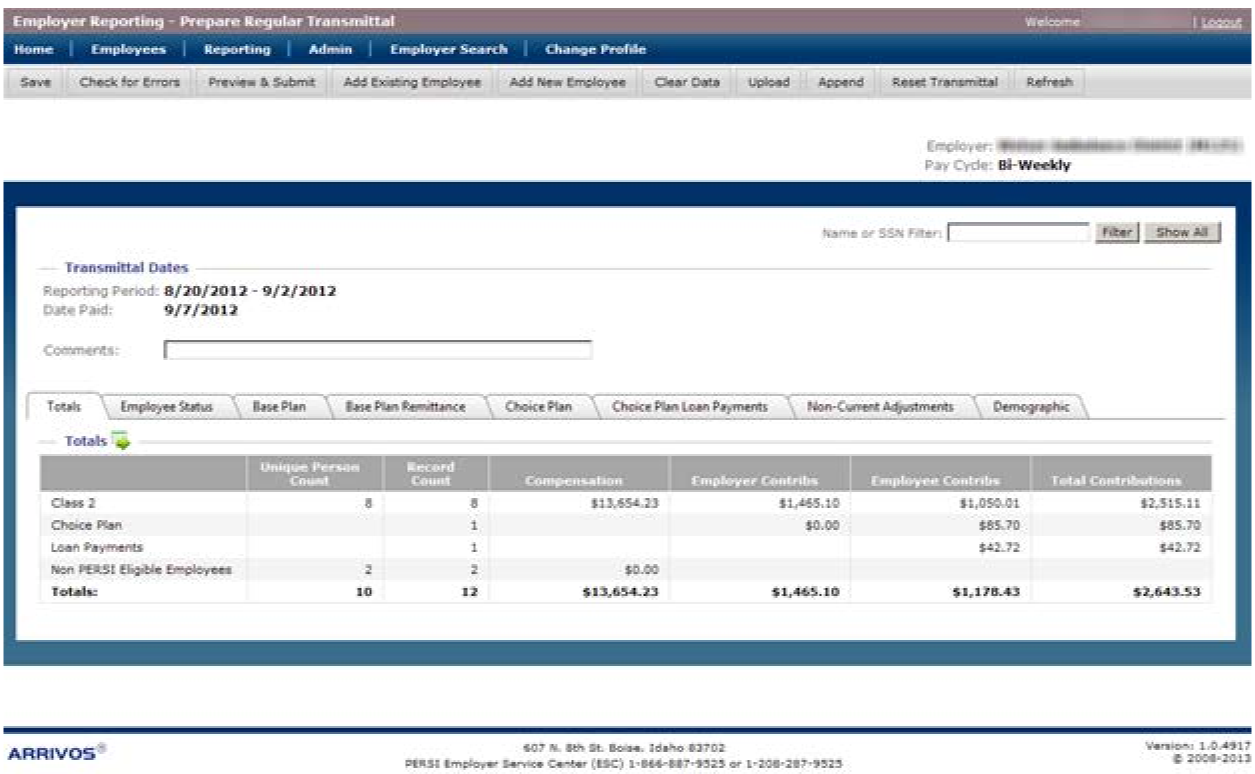
Preparing a Regular Transmittal

The *Prepare Regular Transmittal* page displays your uploaded or rolled-forward data in Arrivos. Use this page to verify and correct your employee data.

Note: This page is the first page a roll-forward employer sees after selecting **Prepare Regular Transmittal** on the main menu. From this point on, the process is the same for both upload and roll-forward employers.

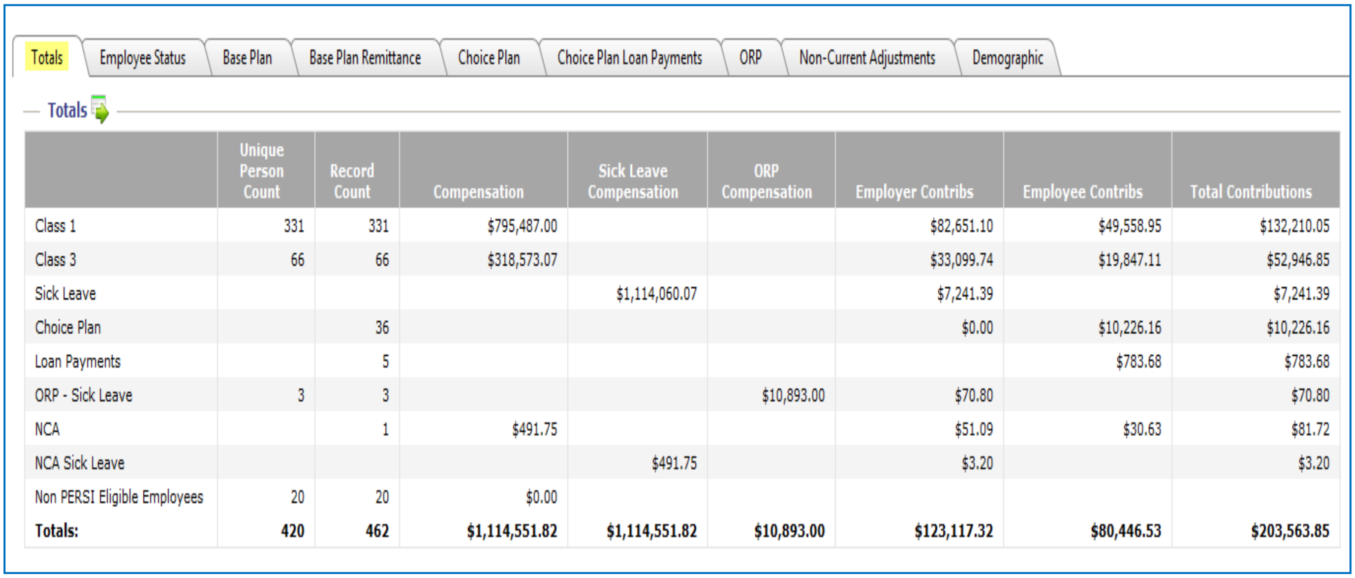
The data in this page is organized into tabs. Each tab contains specific information as identified by the tab heading; for example, the *Demographic* tab displays demographic information for each record. Click a tab to view the data it contains.

Above the tabs, the *Transmittal Dates* section shows the *Reporting Period* associated with the open transmittal and the *Date Paid*. The date paid is the date when the employees were paid for the data submitted.



Viewing Totals

The (read only) *Totals* tab displays the *Record Count*, *Total Compensation*, *Total Contributions*, and other totals based on the detail records for the selected reporting period.



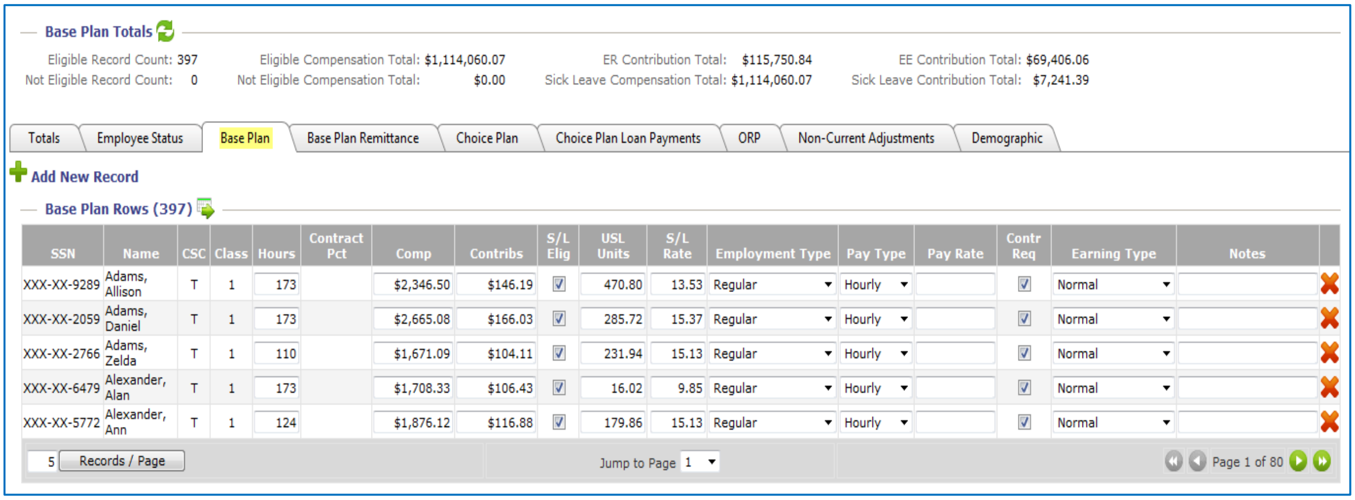
	Unique Person Count	Record Count	Compensation	Sick Leave Compensation	ORP Compensation	Employer Contribs	Employee Contribs	Total Contributions
Class 1	331	331	$795,487.00			$82,651.10	$49,558.95	$132,210.05
Class 3	66	66	$318,573.07			$33,099.74	$19,847.11	$52,946.85
Sick Leave				$1,114,060.07		$7,241.39		$7,241.39
Choice Plan		36				$0.00	$10,226.16	$10,226.16
Loan Payments		5					$783.68	$783.68
ORP - Sick Leave	3	3			$10,893.00	$70.80		$70.80
NCA		1	$491.75			$51.09	$30.63	$81.72
NCA Sick Leave				$491.75		$3.20		$3.20
Non PERSI Eligible Employees	20	20	$0.00					
Totals:	**420**	**462**	**$1,114,551.82**	**$1,114,551.82**	**$10,893.00**	**$123,117.32**	**$80,446.53**	**$203,563.85**

If you make any changes in the *Base Plan* tab—or any other tab—to an employee's compensation, salary, or other data, those changes are reflected on the *Totals* tab in real time.

Reviewing the Base Plan Tab

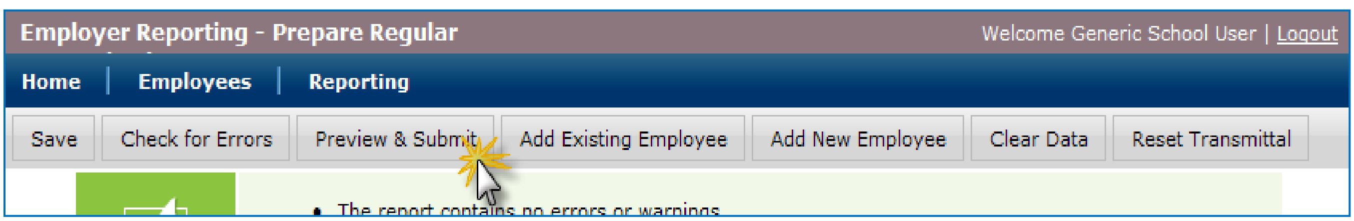
The *Base Plan* tab displays the *Record Count*, *Total Compensation*, *Total Contributions*, and other PERSI Base Plan data for a given employee.

Note: Except for Optional Retirement Plan (ORP) and Working Retired Member (WRM) employees.



Most of the changes or corrections you will need to make to the open transmittal are made in the *Base Plan* tab.

When all of your corrections are complete, click **Preview & Submit** in the action menu (beneath the main menu).

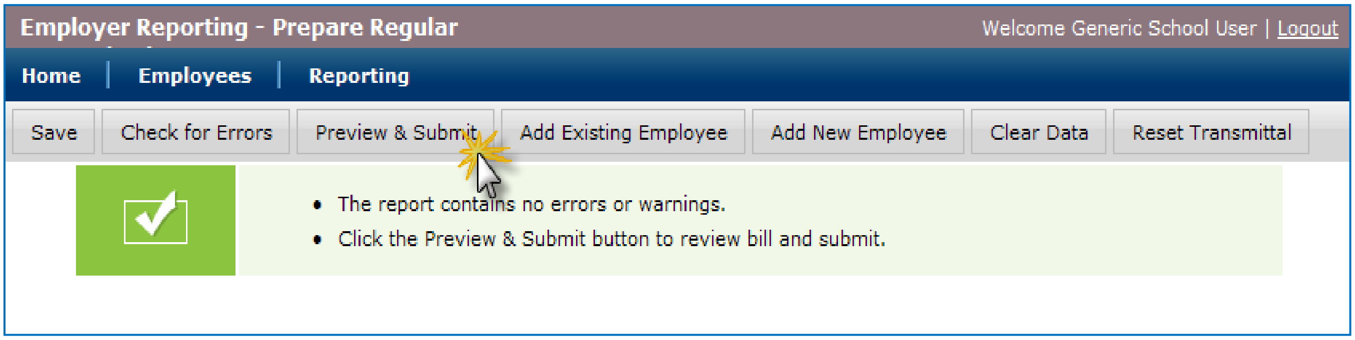


Previewing & Submitting

The *Preview & Submit* function saves your data and checks for errors and warnings.

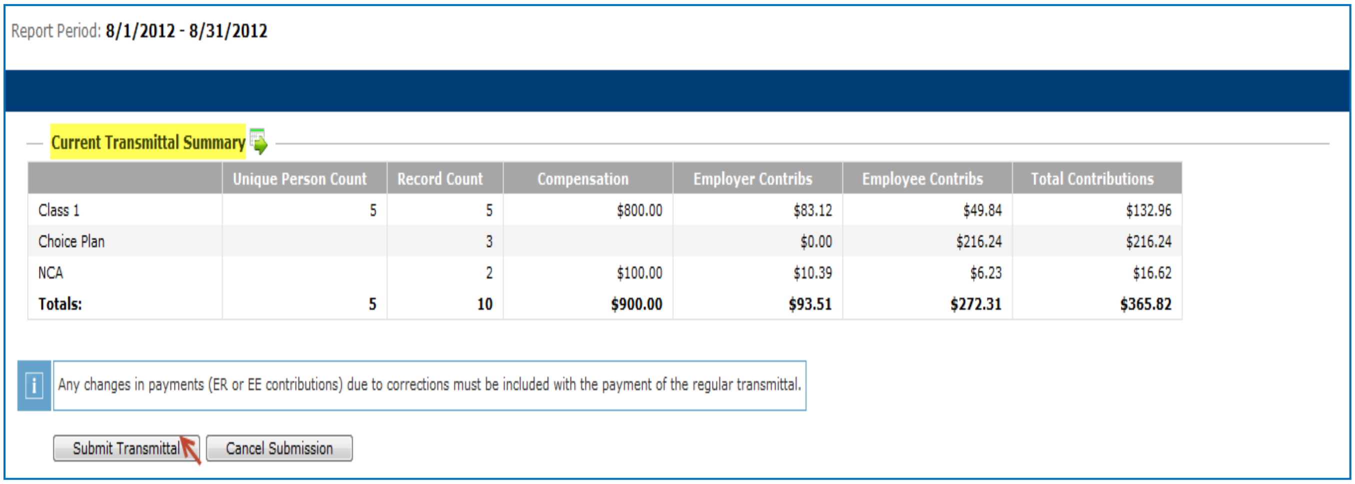
- If there are no errors or warnings, the *Bill Summary* page displays.

The following message displays when **Preview and Submit** is clicked:



Reviewing the Bill Summary Page

The *Bill Summary* page displays a summary of the employees' *Compensation* and *Contributions*. This is the same as the *Totals* tab in the *Prepare Regular Transmittal* page.


Report Period: 8/1/2012 - 8/31/2012

Current Transmittal Summary

	Unique Person Count	Record Count	Compensation	Employer Contribs	Employee Contribs	Total Contributions
Class 1	5	5	$800.00	$83.12	$49.84	$132.96
Choice Plan		3		$0.00	$216.24	$216.24
NCA		2	$100.00	$10.39	$6.23	$16.62
Totals:	**5**	**10**	**$900.00**	**$93.51**	**$272.31**	**$365.82**

Any changes in payments (ER or EE contributions) due to corrections must be included with the payment of the regular transmittal.

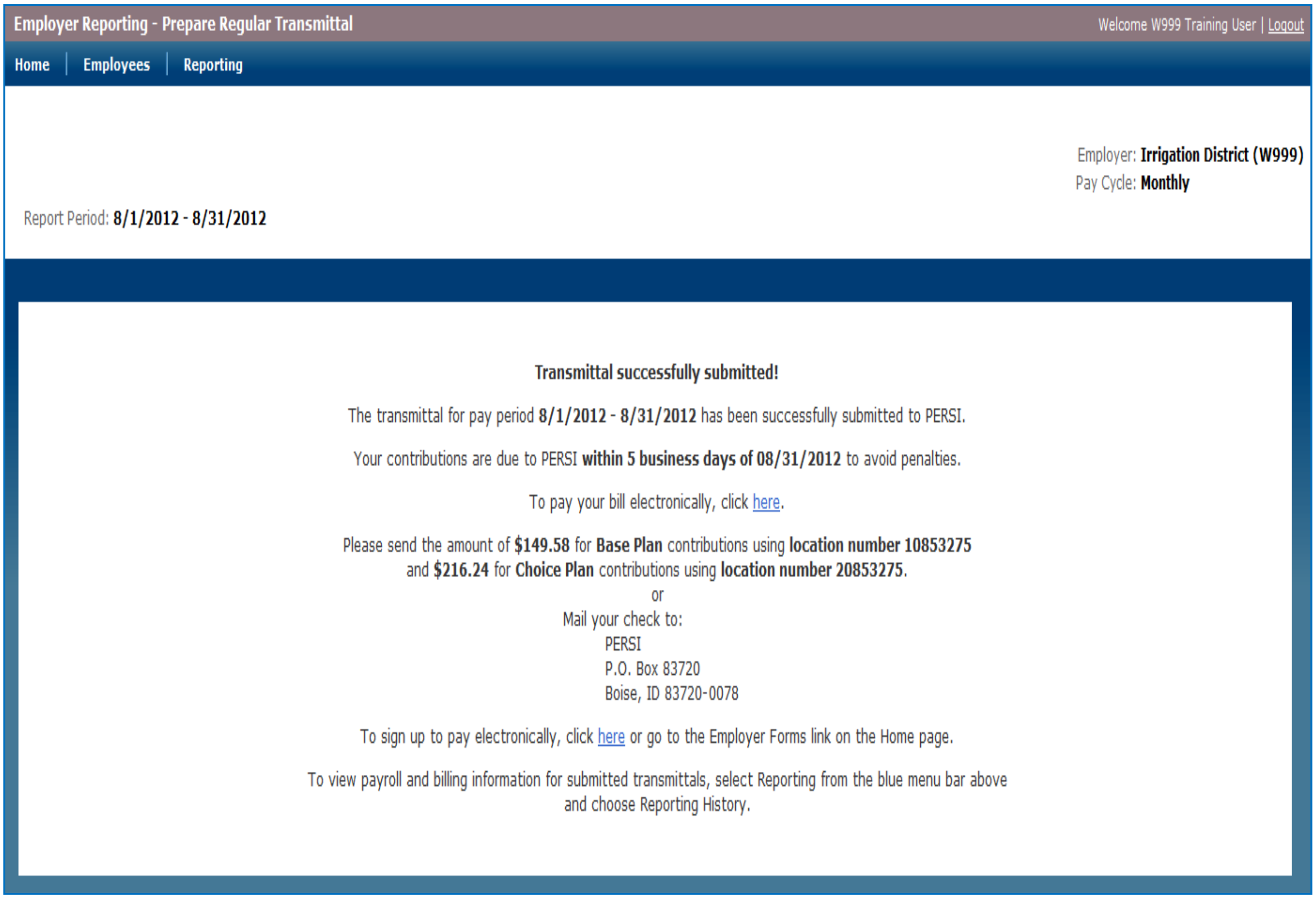
Submit Transmittal | Cancel Submission

To complete this transmittal, click **Submit Transmittal** at the bottom of the screen.

- The *Transmittal Successfully Submitted* page displays.

Reviewing the Successfully Submitted Page

The *Transmittal Successfully Submitted* page tells you if the transmittal has been submitted successfully.

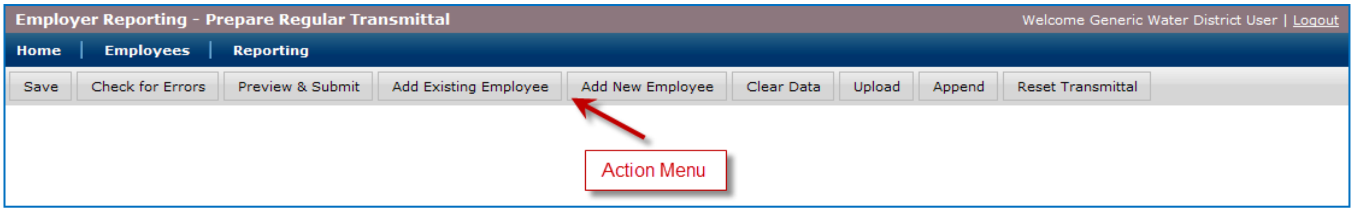


This page also provides links to pay the bill online or to sign up for the electronic payment service. Click these links to open new pages.

Chapter 2: A Detailed Tour of Arrivos

The Action Menu

The action menu is located at the top of the screen beneath the main menu. It contains a series of buttons that perform various business functions.



The action menu provides the following options for roll-forward and upload employers:

- **Save**: Click to save the changes you make on the transmittal grid.
- **Check for Errors**: Click to save and validate the records in your transmittal.
  - If there are any errors, they display on the screen. The error messages indicate the type of error as well as the detailed record or records associated with that error.
- **Preview & Submit**: Click to save your data, check for errors, and display the transmittal summary page if there are no errors.
- **Add Existing Employee**: Click to search for an employee who is not in the current open transmittal, but who has been on transmittals in the past, and then add them as a new row on the grid and tab you are currently viewing.
- **Add New Employee**: Click to add an entirely new employee to the transmittal. This function is used when hiring a new employee.
- **Clear Data**: Click to clear the data from all fields in the open transmittal; including compensation, DB and DC contributions, hours, contract percent, unused sick leave, pay rate, remittances, and loan payments.
- **Reset Transmittal**: Click to delete the open transmittal and start a new transmittal.

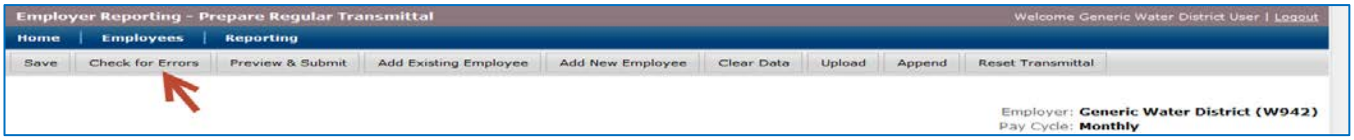
  Caution: All data for this reporting cycle will be deleted. A confirmation dialogue box will be displayed.

The action menu also provides the following options for upload employers alone:

- **Upload**: Click to return to the upload screen and upload a new file to replace the current transmittal data.
- **Append**: Click to return to the upload screen, upload another file, and then append the new file data to the data in the currently-open transmittal.

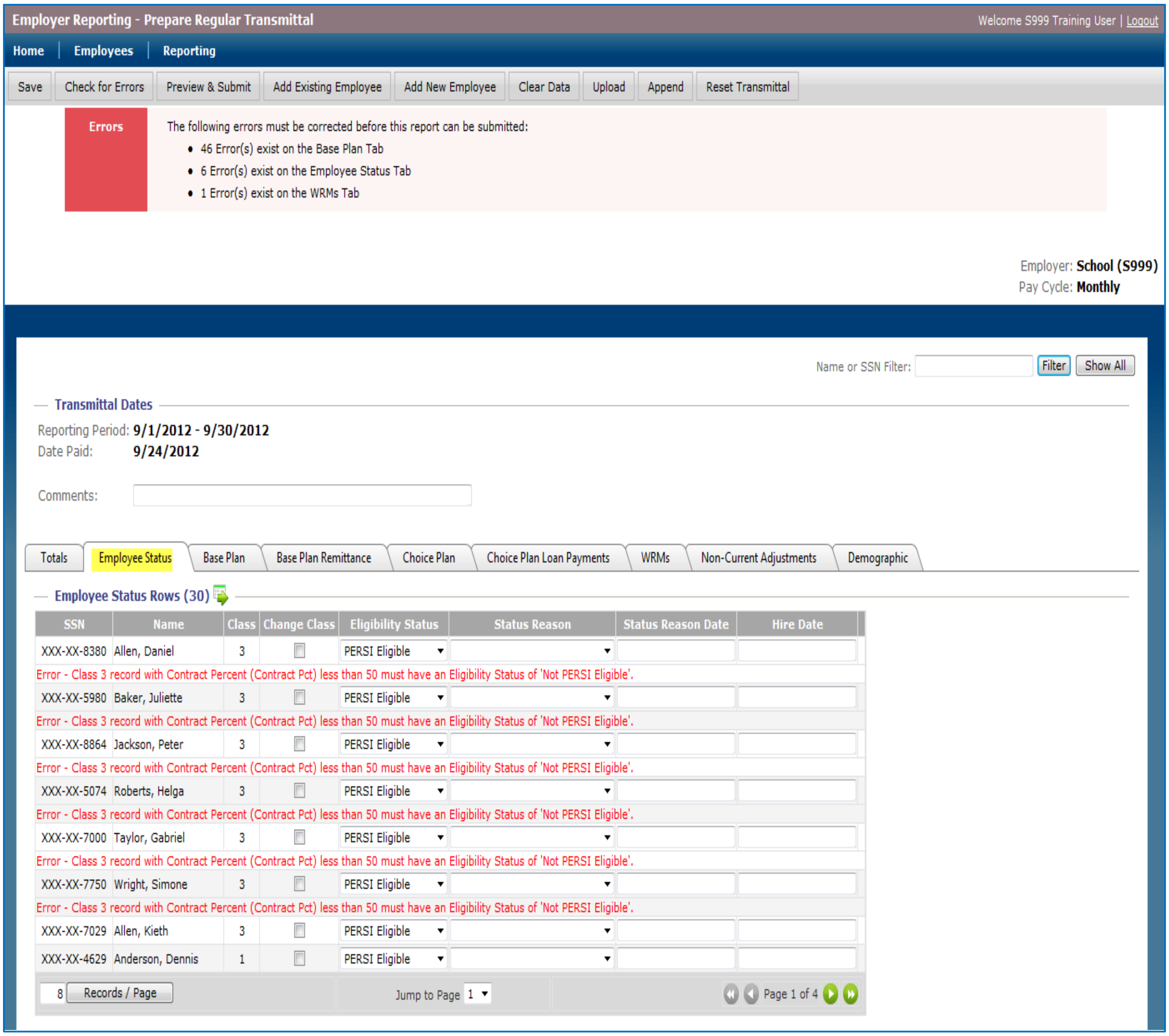
Checking for Errors

To check for errors, click **Check for Errors** in the action menu.



- ➢ Arrivos displays a message box to indicate errors and warnings in the transmittal. The message box indicates which tab the errors are on.

The data grid for each tab sorts all errors and warnings to the top, so you do not need to search through all the pages on each tab to find them.

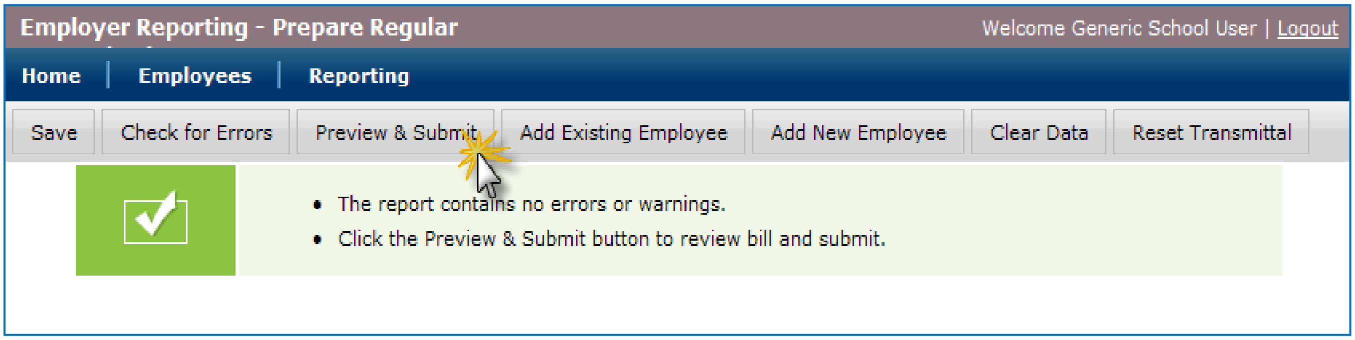


Previewing & Submitting

The *Preview & Submit* function saves your data and checks for errors and warnings.

- If there are no errors or warnings, the *Bill Summary* page displays.

The following screen displays when **Preview and Submit** is clicked:



Transmittal-Related Tabs

Arrivos displays transmittal information in a series of tabs. Click a given tab to view the information it contains.

Totals Tab

Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Totals

	Unique Person Count	Record Count	Compensation	Sick Leave Compensation	ORP Compensation	Employer Contribs	Employee Contribs	Total Contributions
Class 1	331	331	$795,487.00			$82,651.10	$49,558.95	$132,210.05
Class 3	66	66	$318,573.07			$33,099.74	$19,847.11	$52,946.85
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The *Totals* tab is the first tab displayed on a transmittal. This tab displays information such as the *Record Count*, *Total Compensation*, *Total Contributions*, and other totals based on the detail records for the selected reporting period.

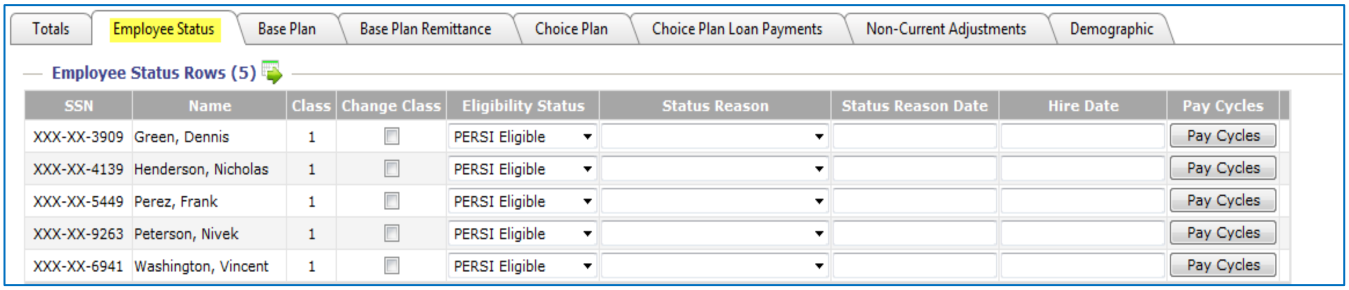
Note: The *Totals* tab is read only.

If you make any changes in the *Base Plan* tab—or any other tab—to an employee's compensation, salary, or other data, those changes are reflected on the *Totals* tab in real time.

Employee Status Tab

The *Employee Status* tab is used to view the *Eligibility Status*, *Status Reason*, *Status Reason Date*, *Class*, *Hire Date*, and *Pay Cycles* for a given employee and edit them as needed. For example, if an employee resigns, you would use this tab to edit the *Status Reason* and *Status Reason Date* for that employee.

The *Employee Status Rows* grid displays a row for each employee on the report (this grid automatically defaults to 50 records per page).



SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date	Pay Cycles
XXX-XX-3909	Green, Dennis	1		PERSI Eligible				Pay Cycles
XXX-XX-4139	Henderson, Nicholas	1		PERSI Eligible				Pay Cycles
XXX-XX-5449	Perez, Frank	1		PERSI Eligible				Pay Cycles
XXX-XX-9263	Peterson, Nivek	1		PERSI Eligible				Pay Cycles
XXX-XX-6941	Washington, Vincent	1		PERSI Eligible				Pay Cycles

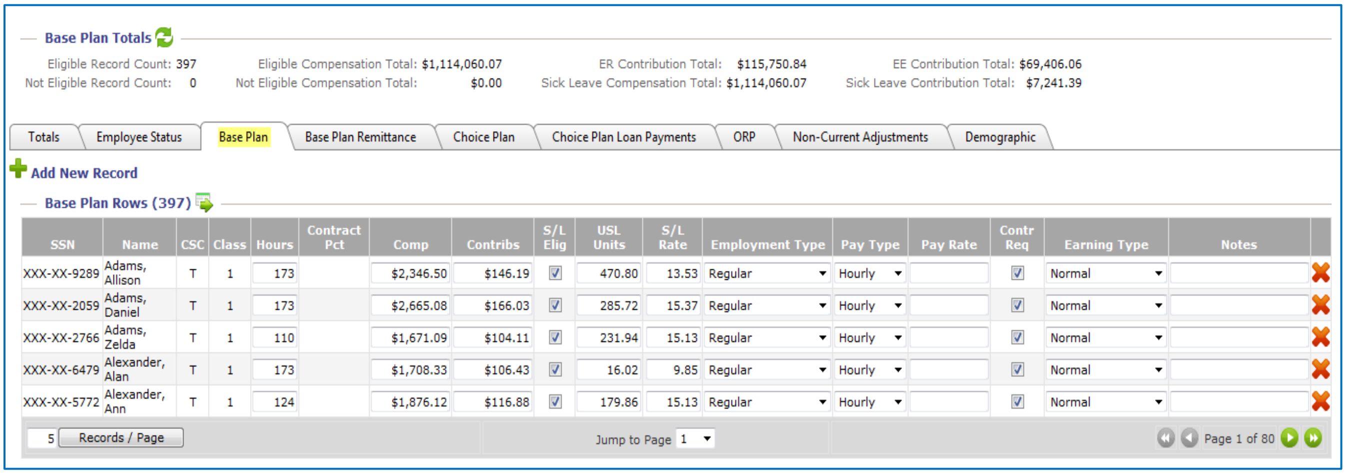
Each row displays the following fields:

- **Change Class:** A checkbox to allow changes to the *Class* field.
- **Eligibility Status:** Displays *PERSI Eligible* or *Not PERSI Eligible*.
- **Status Reason**: Displays a reason for the current *Eligibility Status*. The following reasons pertain to all statuses except where noted:
    - **Deceased**: The employee is deceased.
    - **Employed**: New hires; employees reported for the first time as ORP or PERSI-retired; and employees returned from worker’s compensation, military leave, or leave without pay.
    - **Expiration of Term:** The employee’s term has expired.
    - **Leave Without Pay**: The employee is on leave without pay.
    - **Met Eligibility** (*PERSI Eligible* status only): An employee meets eligibility requirements (use when the employee’s CSC changes from an *A* to a *T* value).
    - **Military Leave**: The employee is on military leave.
    - **No Longer Eligible** (*Not PERSI Eligible* status only): The employee is no longer PERSI eligible.
    - **On Worker’s Compensation**: Salary is not being made whole.
    - **On Worker’s Compensation Made Whole**: Salary is being made whole.
    - **Resigned / Dismissed**: The employee has resigned or been dismissed.
    - **Retired**: The employee has retired.
- **Status Reason Date**: The effective date for the *Status Reason*.
- **Hire Date**: Displays the hire date.
- **Pay Cycles**: A button to make pay cycle changes for the employee. For example, if an employee is changing from the *Monthly* cycle to the *Weekly* cycle, click this button to make the change.

  Note: If the employer only has one pay cycle, this column will not display.

Base Plan Tab

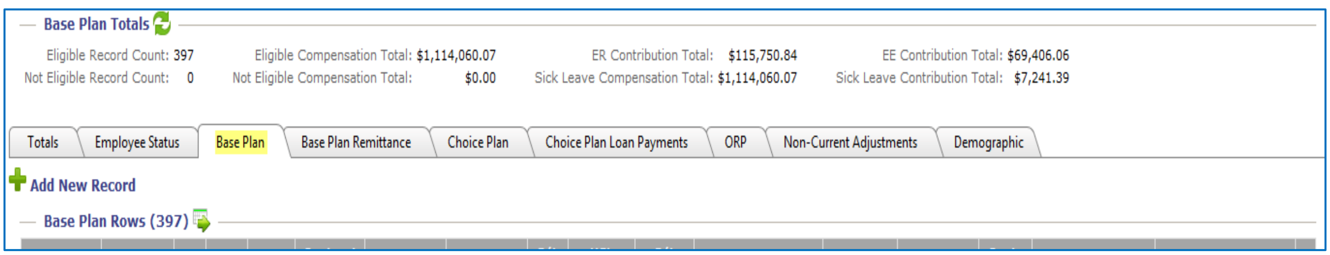
The *Base Plan* tab displays the *Compensation*, *Employee Contributions*, *Employment Type*, and similar information for a given employee.



Base Plan Totals

Above the *Base Plan* tab, the *Base Plan Totals* section displays various totals, such as the total number of records, total compensation, and employee and employer contributions totals.

Note: The contribution totals are for T records only.

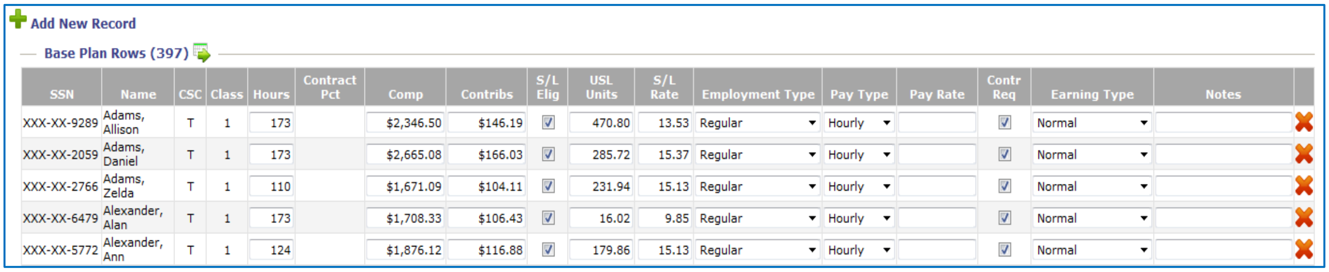


The totals are defined as follows:

- **Eligible Record Count** (T records): Transmittal records for PERSI eligible employees, including other contributions deducted from the employees' pay.
- **Eligible Compensation Total**: Total employee compensation for the current cycle earnings (for T records).
- **ER Contribution Total**: Total employer contributions for the current cycle earnings.
- **EE Contribution Total**: Total employee contributions for the current cycle earnings.
- **Not Eligible Record Count** (A records): Records for all non-PERSI eligible employees.
- **Not Eligible Compensation Total** (A records): Total employee compensation for the current cycle earnings (for A records).

Base Plan Rows Grid

The *Base Plan Rows* grid displays a row for each employee on the report (this grid automatically defaults to 50 records per page).



Add New Record

Base Plan Rows (397)

SSN	Name	CSC	Class	Hours	Contract Pct	Comp	Contribs	S/L Elig	USL Units	S/L Rate	Employment Type	Pay Type	Pay Rate	Contr Req	Earning Type	Notes	
XXX-XX-9289	Adams, Allison	T	1	173		$2,346.50	$146.19	☑	470.80	13.53	Regular	Hourly		☑	Normal		
XXX-XX-2059	Adams, Daniel	T	1	173		$2,665.08	$166.03	☑	285.72	15.37	Regular	Hourly		☑	Normal		
XXX-XX-2766	Adams, Zelda	T	1	110		$1,671.09	$104.11	☑	231.94	15.13	Regular	Hourly		☑	Normal		
XXX-XX-6479	Alexander, Alan	T	1	173		$1,708.33	$106.43	☑	16.02	9.85	Regular	Hourly		☑	Normal		
XXX-XX-5772	Alexander, Ann	T	1	124		$1,876.12	$116.88	☑	179.86	15.13	Regular	Hourly		☑	Normal		

Users cannot edit the *SSN*, *Name*, *Class*, and *CSC* fields for a given row, but they may edit all of the following fields:

- **Hours**: Displays the hours worked in association with the wages for the row.
- **Contract Pct**: Displays the contract percent (for Class 3 employees only). This must be a number between 1 and 100.
- **Comp**: Displays the compensation for the row being reported.
- **Contributions**: Displays the contributions associated with the compensation for the row.
- **S/L Elig**: Check this box if the employee is eligible for PERSI sick leave.
- **USL Units**: Displays the number of sick leave days or hours an employee has.
- **S/L Rate**: Displays the daily or hourly rate for the sick leave units.
- **Employment Type**: Displays *Regular*, *Seasonal*, *Substitute Teacher*, *Student* (employed at the college or university attended), or *Inmate*.
- **Pay Type**: Displays *Daily*, *Hourly*, *Salaried*, or *Other*.
- **Pay Rate**: Depending on the *Pay Type*, this is the hourly or daily pay rate or annual salary.
- **Contr Req**: This box is checked when the employee contributions are required.
- **4-Day Week** (school districts only): Check this box if the employee works a 4-day work week.
- **Earning Type**: Displays the earning category, such as *Bonus*, *Normal*, *Other*, *Sick*, *Vacation,* and *USL Non-Pension (*non-pensionable, sick-leave eligible earnings).
- **Notes**: Displays the earnings explanation from the file uploaded by the employer. This field is also used as a notes field and is required when the *Earning Type* is *Other*. This field is limited to 176 characters.

To add a new record to the *Base Plan Rows* grid, perform the following:

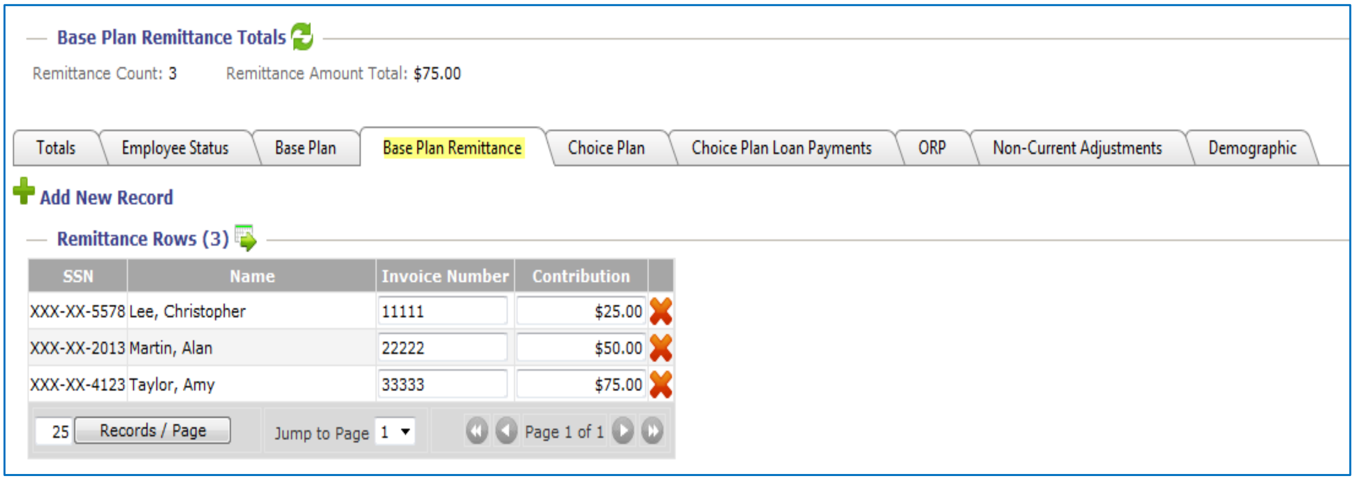
1. Click the **Add New Record** icon.
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item.
5. Enter the appropriate data.

Base Plan Remittance Tab

The *Base Plan Remittance* tab lists all employees with an invoice payment for the current transmittal.

Above the tab, the *Base Plan Remittance Totals* section displays both the remittance record count and remittance total.

The *Remittance Rows* grid includes the *SSN*, *Name*, *Invoice Number*, and *Contribution* for each employee (this grid automatically defaults to 25 records per page).



Use this tab to add or delete records from the *Remittance Rows* grid or edit the following fields:

- **Invoice Number**: Type the employee invoice number.
- **Contribution**: Type the employee contribution associated with the invoice.

To add a new record to the *Remittance Rows* grid, perform the following:

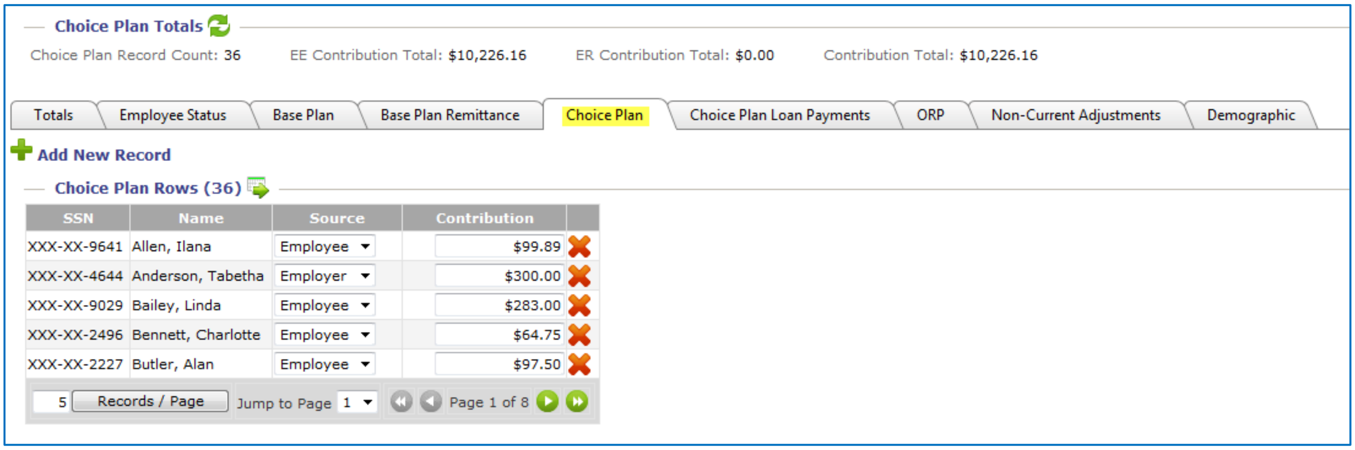
1. Click the **Add New Record** icon. 
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item. 
5. Enter the appropriate data.

Choice Plan Tab

The *Choice Plan* tab lists all defined contributions (DC) from employers and employees into the PERSI Choice 401(K) Plan.

Above the tab, the *Choice Plan Totals* section shows record count totals and contribution totals broken out by employer and employee.

The *Choice Plan Rows* grid includes the *SSN*, *Name*, *Source*, and *Contribution* amount for each listed contribution (this grid automatically defaults to 25 records per page).



Use this tab to add or delete records from the *Choice Plan Rows* grid or edit the following fields:

- **Source**: Select whether the record is an *Employer* contribution or *Employee* contribution.
- **Contribution**: Type the DC amount the employee or employer contributed.

To add a new record to the *Choice Plan Rows* grid, perform the following:

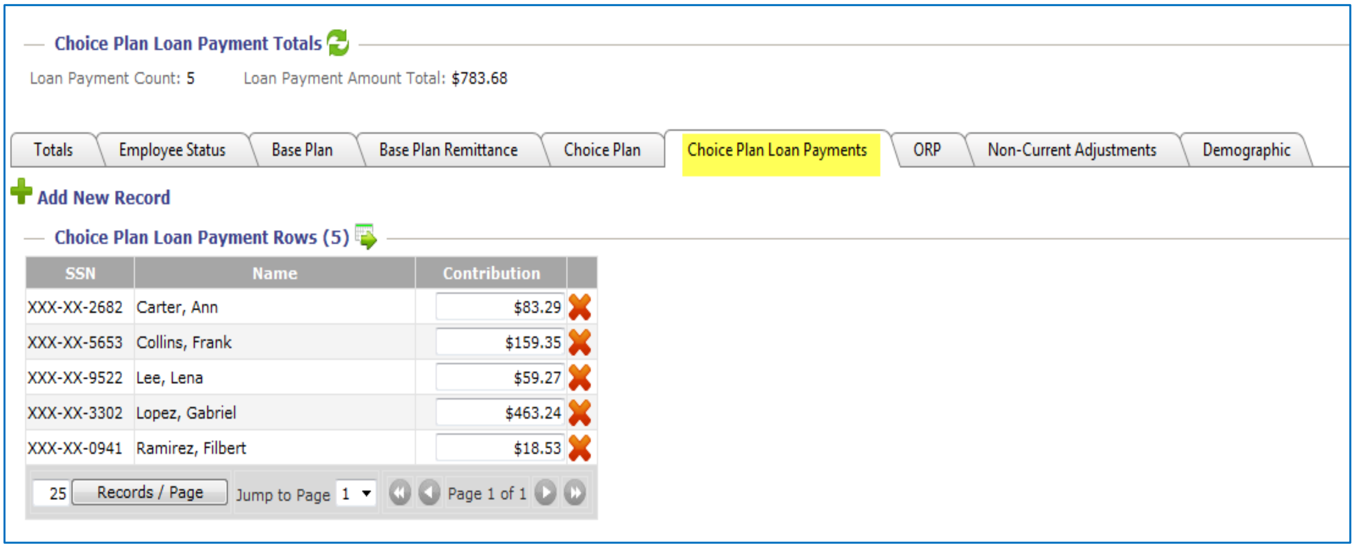
1. Click the **Add New Record** icon.
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item.
5. Enter the appropriate data.

Choice Plan Loan Payments Tab

The *Choice Plan Loan Payments* tab displays all payments against your employees' outstanding DC loans.

Above the tab, the *Choice Plan Loan Payment Totals* section shows both the record count for the loan payments and the total loan repayment amount.

The *Choice Plan Loan Payment Rows* grid includes the employee's *SSN*, *Name*, and *Contribution* (this grid automatically defaults to 25 records per page).



Use this tab to add or delete records from the *Choice Plan Loan Payment Rows* or edit the following field:

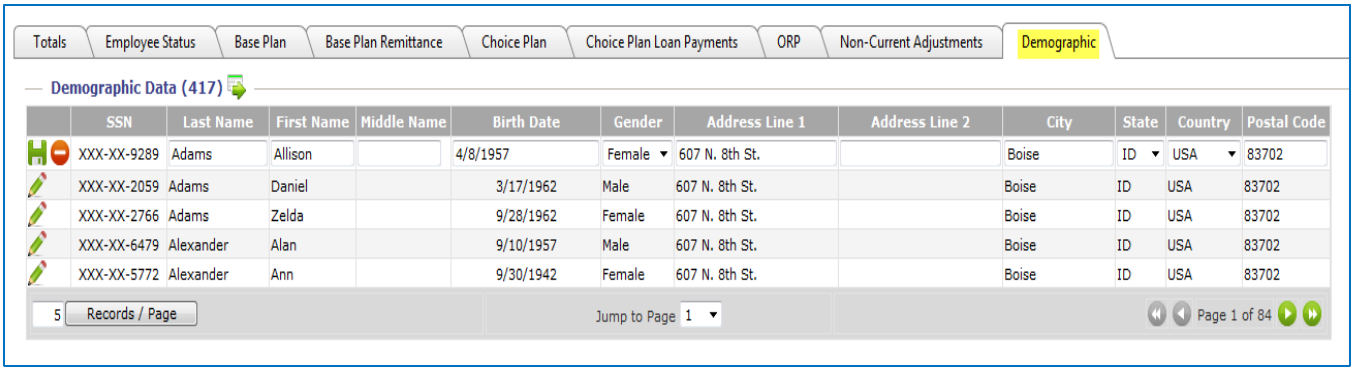
- **Contribution**: Type the dollar amount of the repayment toward the employee's DC loan.

To add a new record to the *Choice Plan Loan Payment Rows*, perform the following:

1. Click the **Add New Record** icon.
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item.
5. Enter the appropriate data.

Demographic Tab

The *Demographic* tab displays an employee's personal information.



	SSN	Last Name	First Name	Middle Name	Birth Date	Gender	Address Line 1	Address Line 2	City	State	Country	Postal Code
	XXX-XX-9289	Adams	Allison		4/8/1957	Female	607 N. 8th St.		Boise	ID	USA	83702
	XXX-XX-2059	Adams	Daniel		3/17/1962	Male	607 N. 8th St.		Boise	ID	USA	83702
	XXX-XX-2766	Adams	Zelda		9/28/1962	Female	607 N. 8th St.		Boise	ID	USA	83702
	XXX-XX-6479	Alexander	Alan		9/10/1957	Male	607 N. 8th St.		Boise	ID	USA	83702
	XXX-XX-5772	Alexander	Ann		9/30/1942	Female	607 N. 8th St.		Boise	ID	USA	83702

The *Demographic Data* grid contains the following fields:

- **Last Name**: The employee's last name.
- **First Name**: The employee's first name.
- **Middle Name**: The employee's middle name.
- **Birth Date**: The employee's birth date (M/D/YYYY).
- **Gender**: Select *Male* or *Female*.
- **Address Line 1**: Address Line 1 for the employee.
- **Address Line 2**: Address Line 2 for the employee.
- **City**: The employee's city of residence.
- **State**: Select the employee's state of residence.
- **Postal Code**: The employee's postal code.

Use this tab to edit an employee's information by performing the following:

1. Click the **Edit** icon to make a row editable.

   Note: All fields are editable except *SSN*. To correct an employee's *SSN*, please contact PERSI.

2. Perform the necessary changes.
3. Choose one of the following options:
   - Click the **Save** icon to save the edited information and return the row to a non-editable state.
   - Click the **Cancel** icon to revert to the original data (undo your changes) and return the row back to a non-editable state.

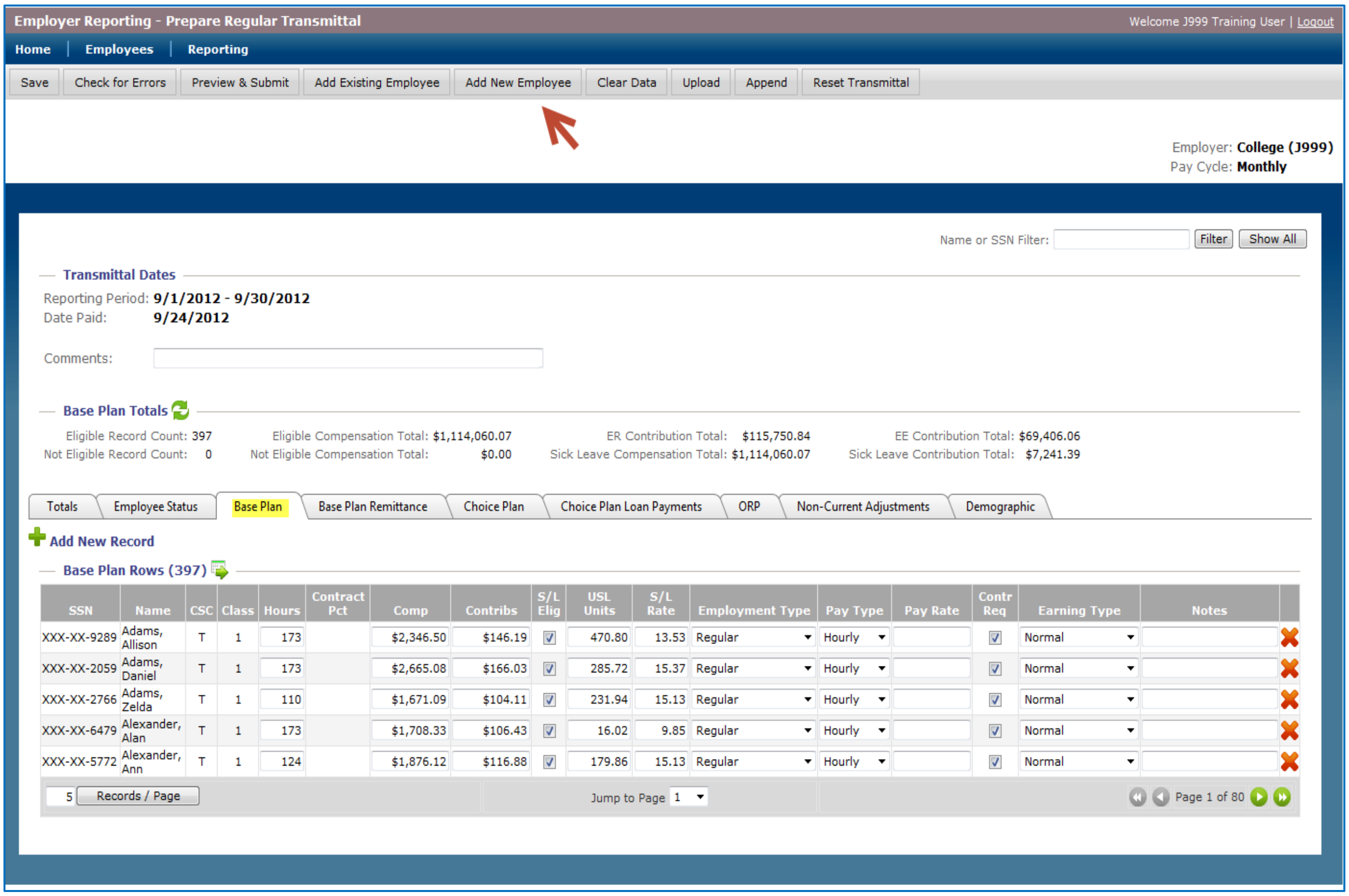
Chapter 3: Common Transmittal Processes

Adding a New Employee

The *Add New Employee* function on the action menu adds a new employee to the transmittal as a new row on the grid and tab you are currently viewing.

To use the *Add New Employee* function, perform the following steps:

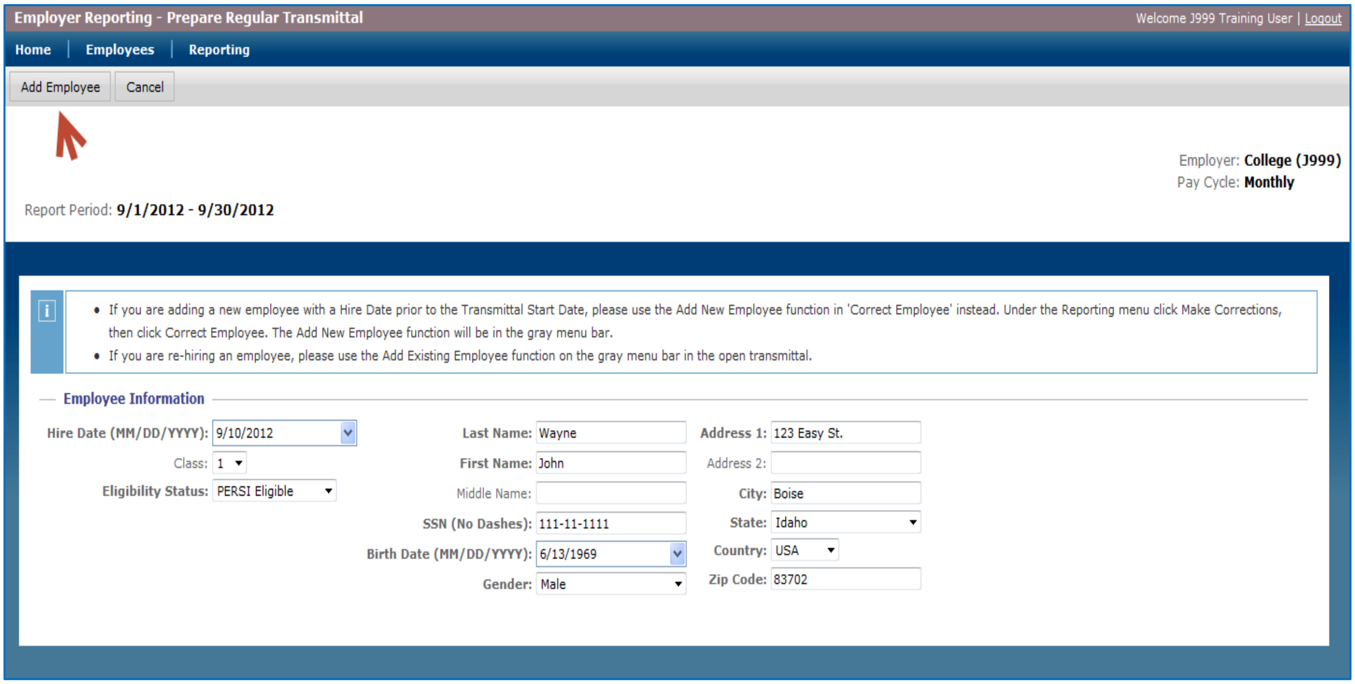
Step 1: Click Add New Employee.



Click **Add New Employee** on the action menu.

➢ The *Employee Information* page displays.

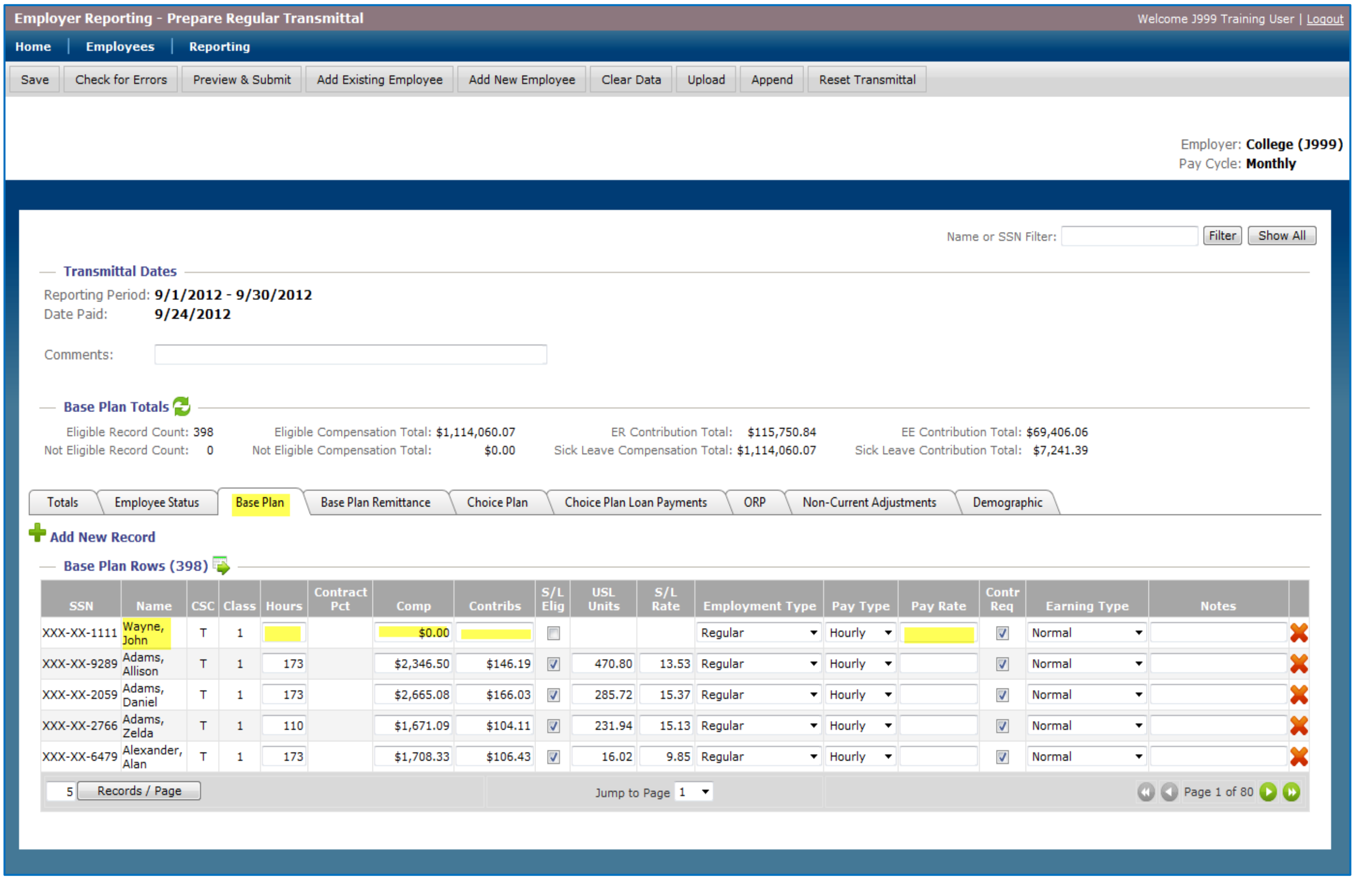
Step 2: Enter the new employee's personal information.



Use the *Employee Information* page to enter information for the new employee by performing the following:

1. Enter data into the following fields:
   - **Hire Date: Required.**
   - **Class**: Required. Select whether the employee is Class *1*, *2*, *3*, *4*, *D*, or *E*.
   - **Last Name: Required.**
   - **First Name: Required.**
   - **Middle Name: Optional.**
   - **SSN (No Dashes): Required.**
   - **Birth Date: Required.**
   - **Address 1: Required.**
   - **Address 2**: Optional.
   - **City: Required.**
   - **State**: **Required.** This field is set to *Idaho* by default.
   - **Zip Code: Required.**
   - **Gender: Required.**
2. Click **Add Employee** in the action bar.

Step 3: Provide contribution data.

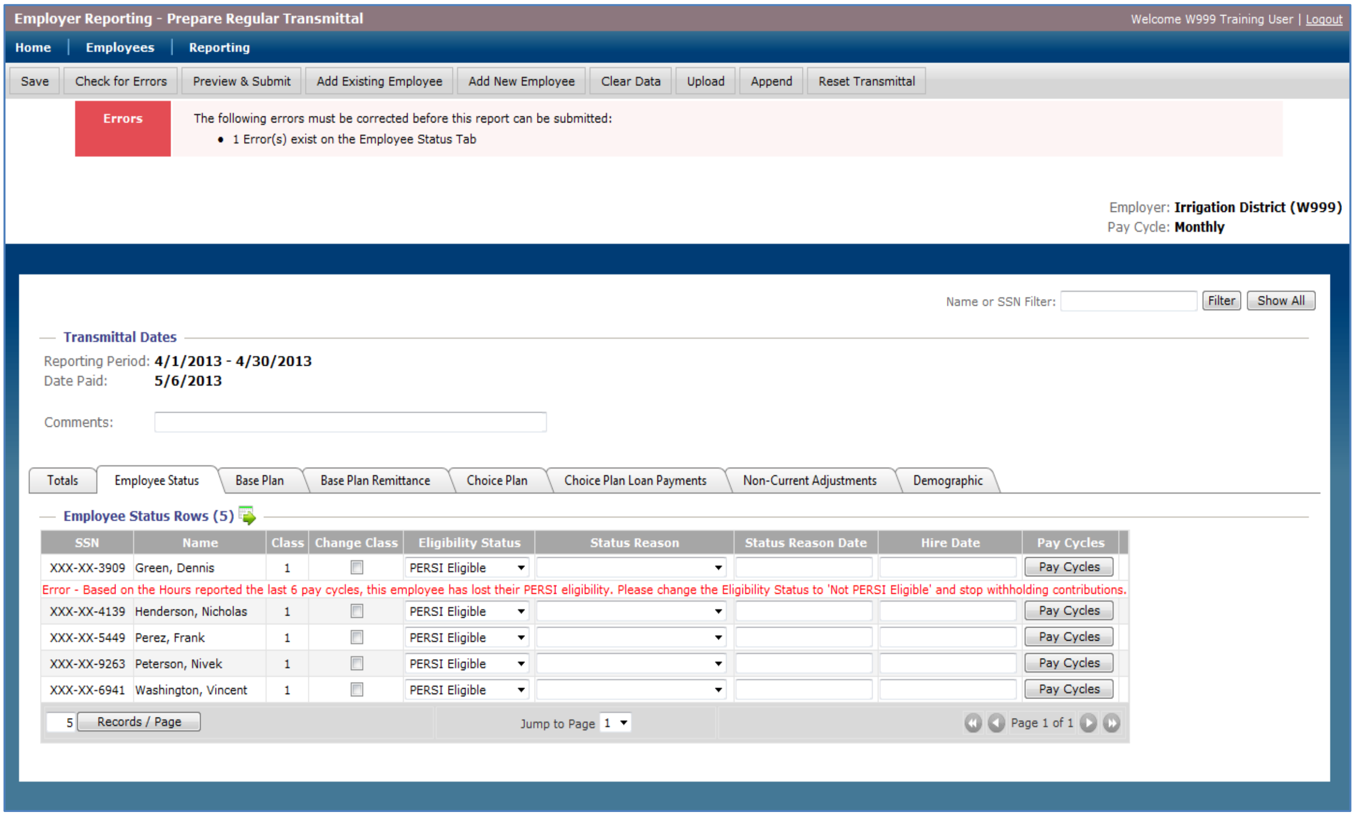


The employee is added as a new row on the tab and grid you were viewing when you clicked **Add New Employee**. (In the screenshot above, this is the *Base Plan* tab.)

Enter the necessary data in the *Compensation*, *Contributions*, *Pay Rate*, and other fields.

Correcting Eligibility Errors

To correct or modify entries that receive eligibility error messages within Arrivos, click the **Employee Status** tab in the open transmittal.



If you determine the employee is PERSI eligible, perform the following in the *Employee Status* tab:

1. Select **PERSI Eligible** in the *Eligibility Status* field for that employee.
2. Select **Employed** in the *Status Reason* field
3. Enter the date for the status transition in the *Status Reason Date* field
4. Click **Check for Errors** in the action menu.

If you determine the employee is not PERSI Eligible, perform the following in the *Employee Status* tab:

1. Select **Not PERSI Eligible** in the *Eligibility Status* field for that employee.
2. Select **Employed** in the *Status Reason* field
3. Enter the date for the status transition in the *Status Reason Date* field
4. Click **Check for Errors** in the action menu.

Reporting Leaves

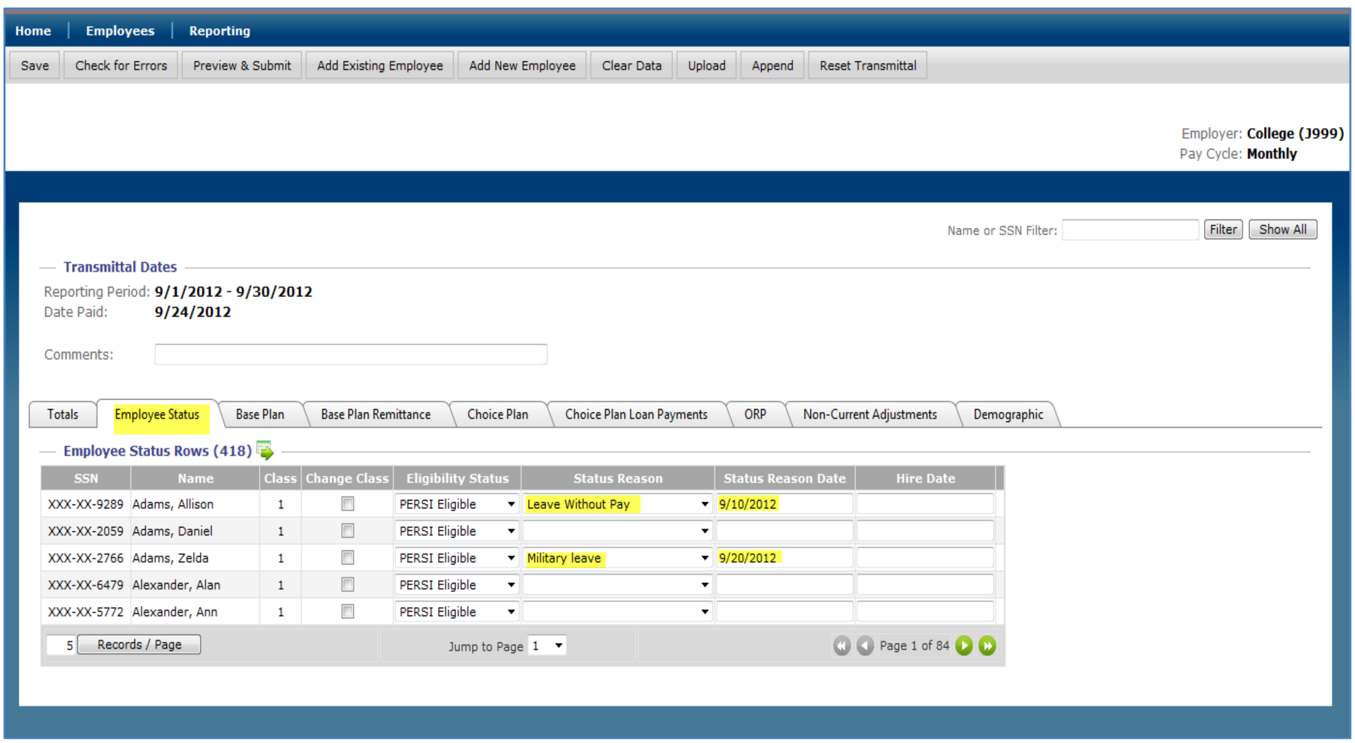
To report the start or end of employee leave, whether it is leave without pay (LWOP) or military leave, perform the following:

1. Click **Reporting** on the main menu**.**
2. Click **Prepare Regular Transmittal** in the sub-menu.
   - ➢ The transmittal displays.
3. Select the **Employee Status** tab in the open transmittal.
4. Locate the appropriate employee.

Reporting when a leave begins.

To report the start of leave for the employee, perform the following in the *Employee Status* tab:

1. Select **Leave Without Pay** or **Military Leave** in the *Status Reason* field.
2. Type the start date in the **Status Reason Date** field.



3. Click **Check for Errors** in the action menu.

Reporting when a leave ends.

To report the end of leave for the employee, perform the following in the *Employee Status* tab:

1. Select the appropriate status reason in the *Status Reason* field.

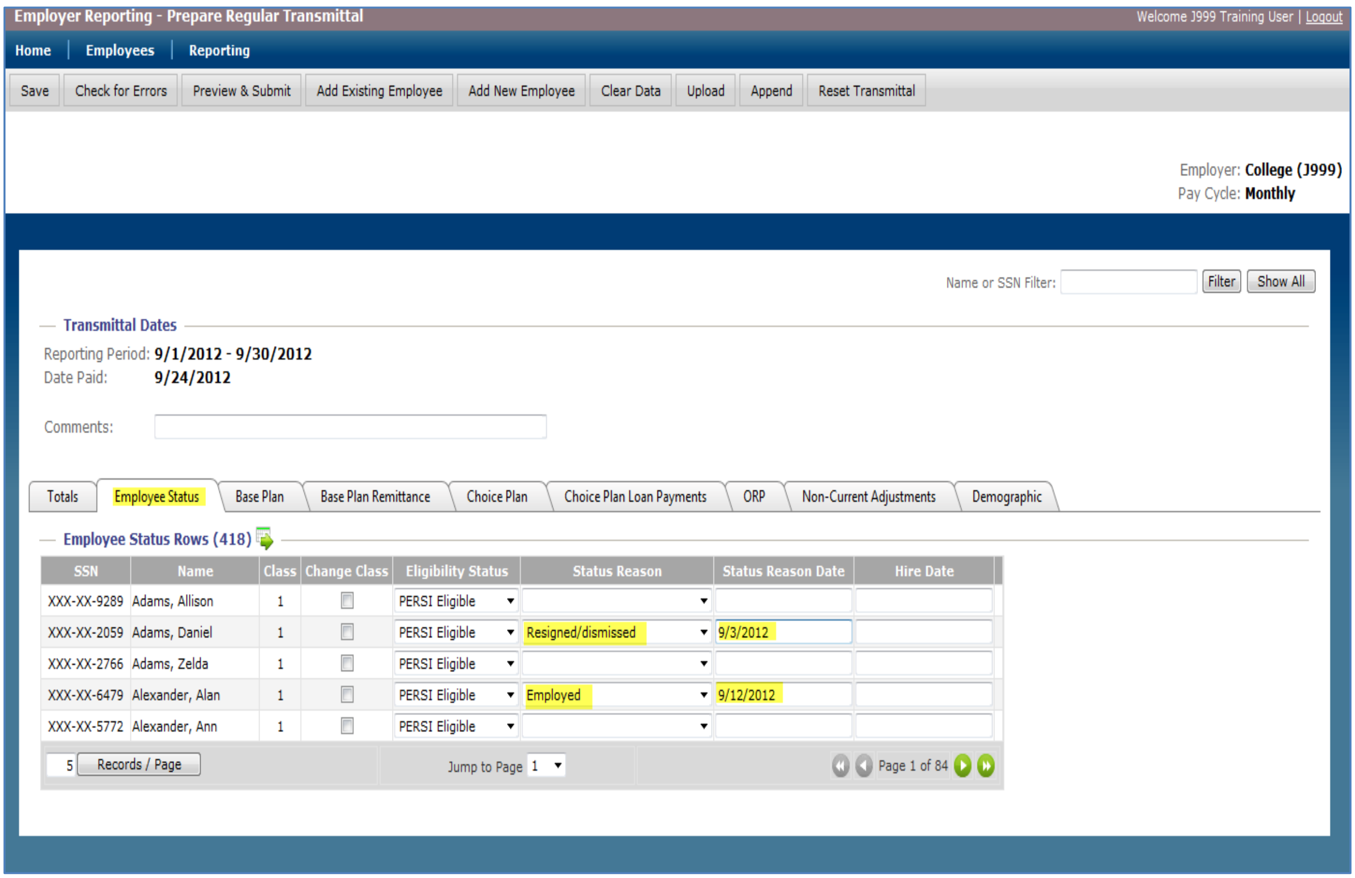
   Common status reasons include the following:

   - **Employed**: When an employee returns to work.
   - **Resigned / Dismissed**: When an employee terminates employment.

   Less-common status reasons include the following:

   - **Retired**: When the employee decides to retire.
   - **Deceased**: When the employee is deceased.

2. Type the end date in the **Status Reason Date** field.

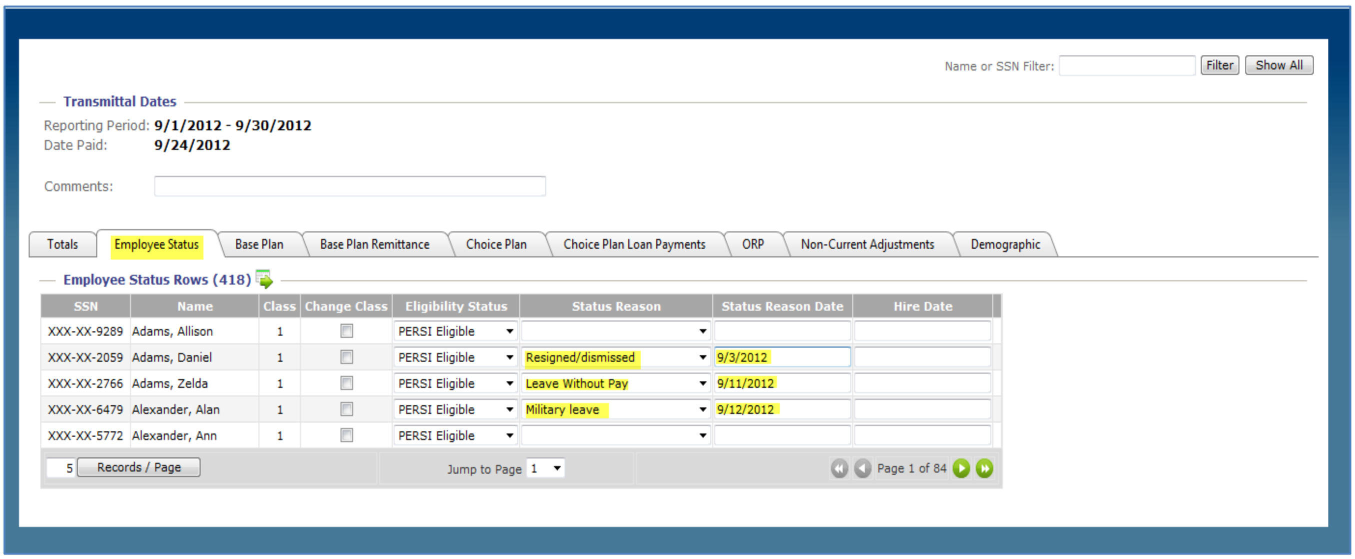


3. Click **Check for Errors** in the action menu.

Reporting Resignations and Dismissals

To report a resignation or dismissal for an employee, perform the following:

1. Click **Reporting** on the main menu**.**
2. Click **Prepare Regular Transmittal** in the sub-menu.
    - ➢ The transmittal displays.
3. Select the **Employee Status** tab in the open transmittal.
4. Locate the resigned/dismissed employee.
5. Select **Resigned / Dismissed** in the *Status Reason* field for that employee.
6. Type the resignation/dismissal date in the *Status Reason Date* field for that employee.

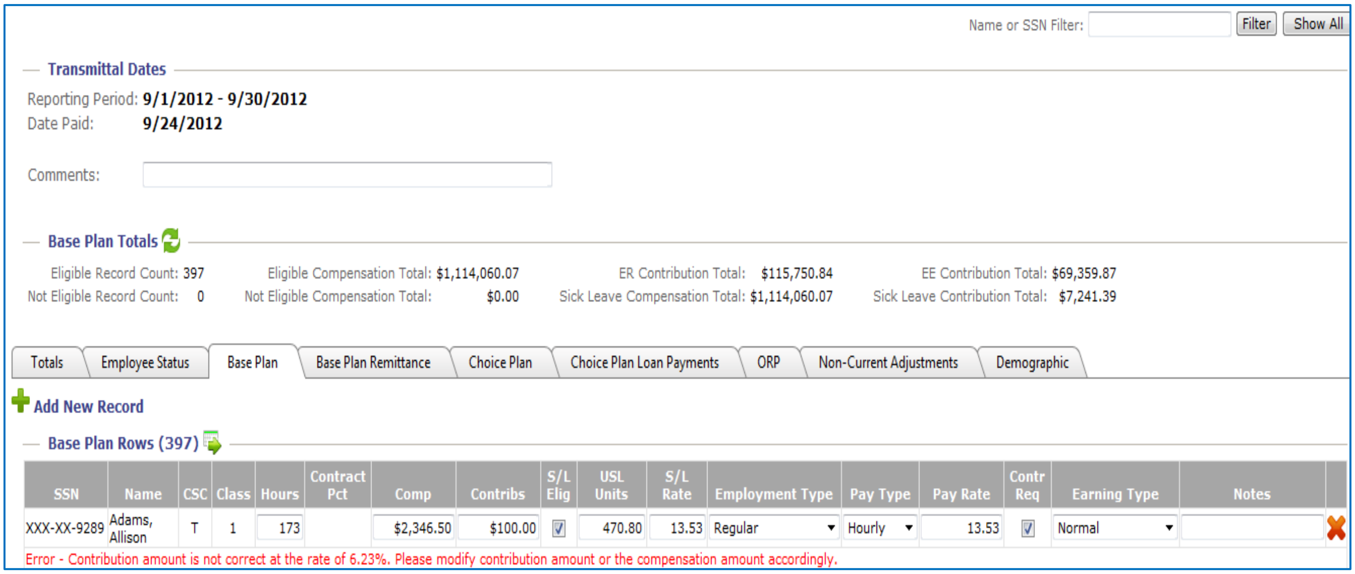


7. Click the **Check for Errors** in the action menu.

Correcting a Contribution Rate Discrepancy

If Arrivos detects a contribution rate discrepancy issue in the *Base Plan* tab when you click **Check for Errors** in the action menu, Arrivos displays the following message:

- "Error - Contribution amount is not correct at the rate of [#%]. Please modify contribution amount or the compensation amount accordingly."



Contribution rate discrepancy errors indicate that an upload or roll-forward employer has an employee on the *Base Plan* tab with the wrong employee contribution amount based on the compensation multiplied by the employee's contribution rate.

To correct this error, perform the following actions:

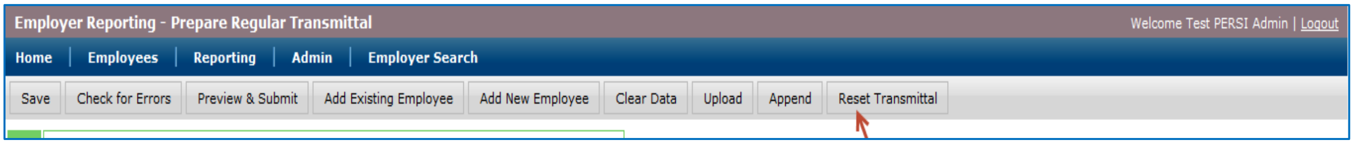
1. Multiply the employee's compensation (in the *Comp* field) by the contribution percentage indicated in the error message; for example, $4535.02 * .06 = 272.10.
2. Type the resulting value in the **Contribs** field.

Resetting a Transmittal

The *Reset Transmittal* function is used to delete the open transmittal.

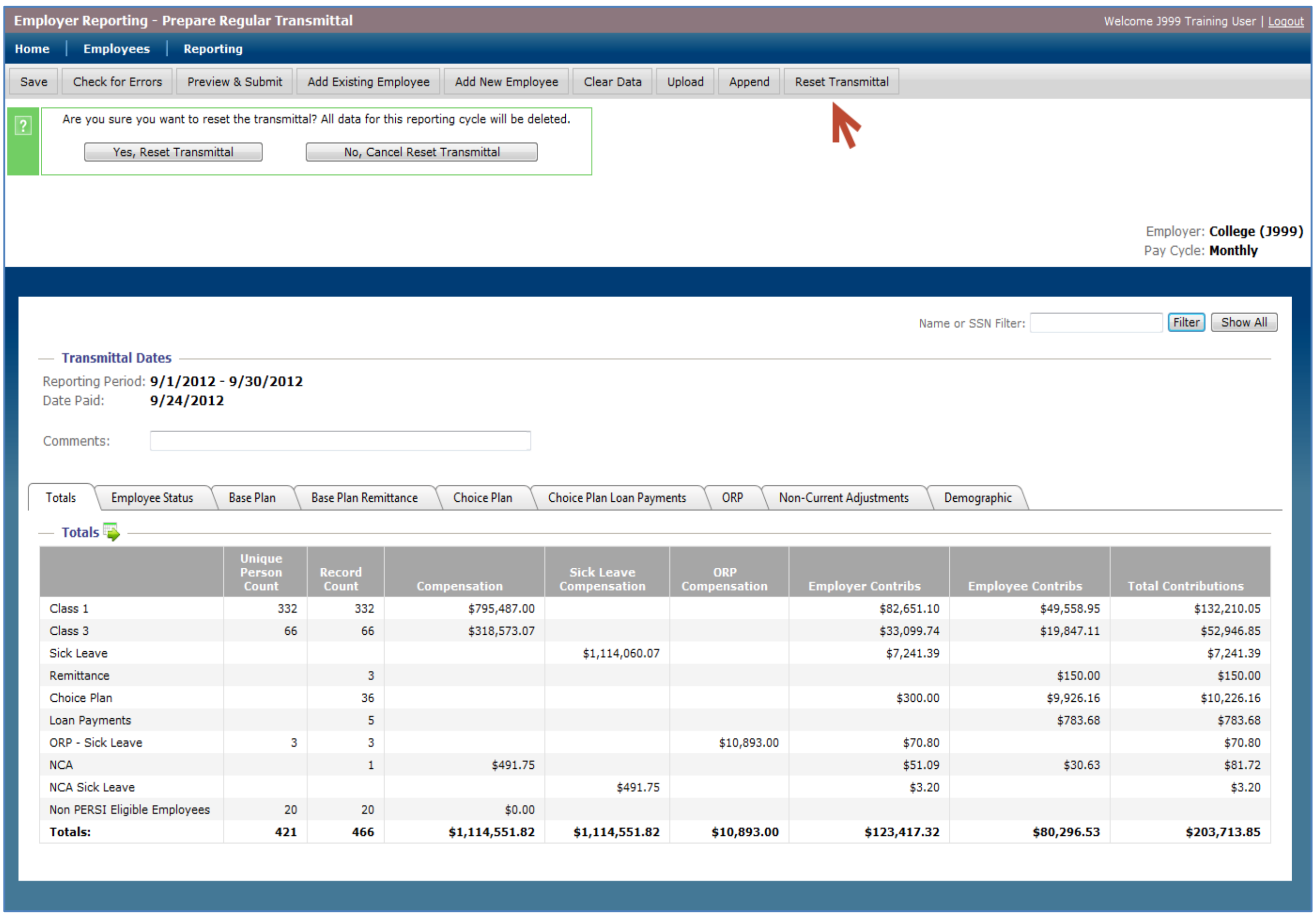
To reset and delete the open transmittal, perform the following:

1. Click **Reset Transmittal** in the action menu.



➢ A confirmation message asks "Are you sure you want to reset the transmittal? All data for this reporting cycle will be deleted."

2. Click **Yes, Reset Transmittal** to confirm or **No, Cancel Reset Transmittal** to cancel.



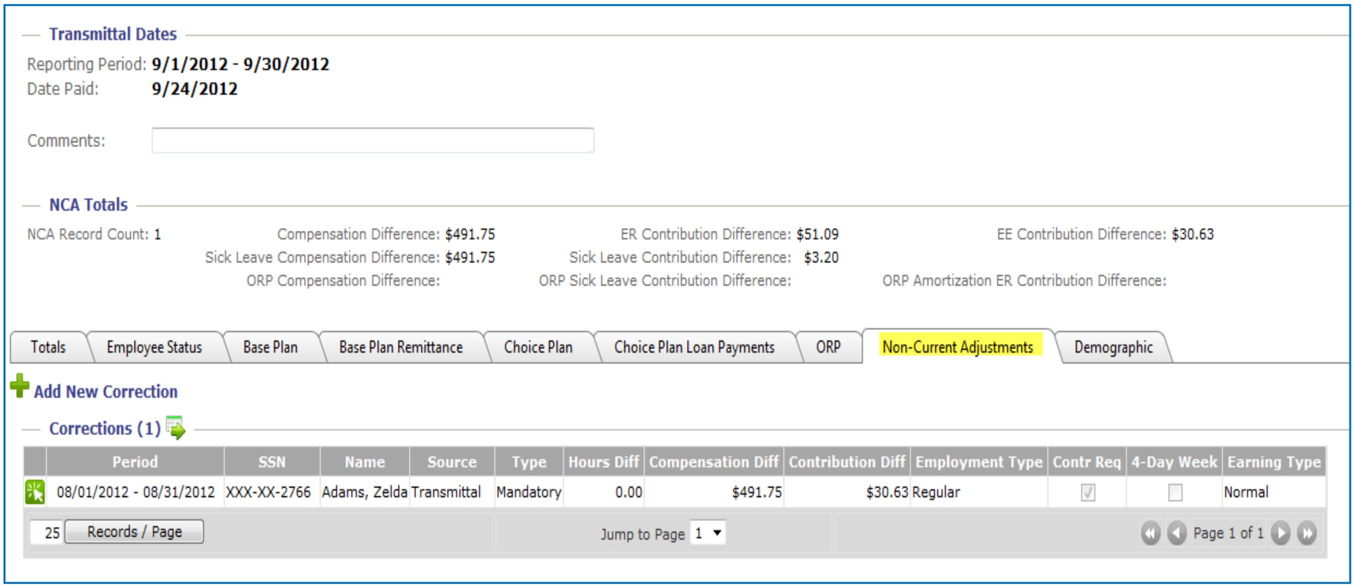
	Unique Person Count	Record Count	Compensation	Sick Leave Compensation	ORP Compensation	Employer Contribs	Employee Contribs	Total Contributions
Class 1	332	332	$795,487.00			$82,651.10	$49,558.95	$132,210.05
Class 3	66	66	$318,573.07			$33,099.74	$19,847.11	$52,946.85
Sick Leave				$1,114,060.07		$7,241.39		$7,241.39
Remittance		3					$150.00	$150.00
Choice Plan		36				$300.00	$9,926.16	$10,226.16
Loan Payments		5					$783.68	$783.68
ORP - Sick Leave	3	3			$10,893.00	$70.80		$70.80
NCA		1	$491.75			$51.09	$30.63	$81.72
NCA Sick Leave				$491.75		$3.20		$3.20
Non PERSI Eligible Employees	20	20	$0.00					
Totals:	**421**	**466**	**$1,114,551.82**	**$1,114,551.82**	**$10,893.00**	**$123,417.32**	**$80,296.53**	**$203,713.85**

➢ If the reset is confirmed, the open transmittal is deleted and you are returned to the home page.

Chapter 4: Corrections

The Non-Current Adjustments Tab

The *Non-Current Adjustments* tab displays a summary of all non-current adjustments by row (this grid automatically defaults to 25 records per page).



Any data submitted in the *Make Corrections* page (accessed via the *Reporting* sub-menu) displays on this tab as well as any NCA data from the employer's upload file.

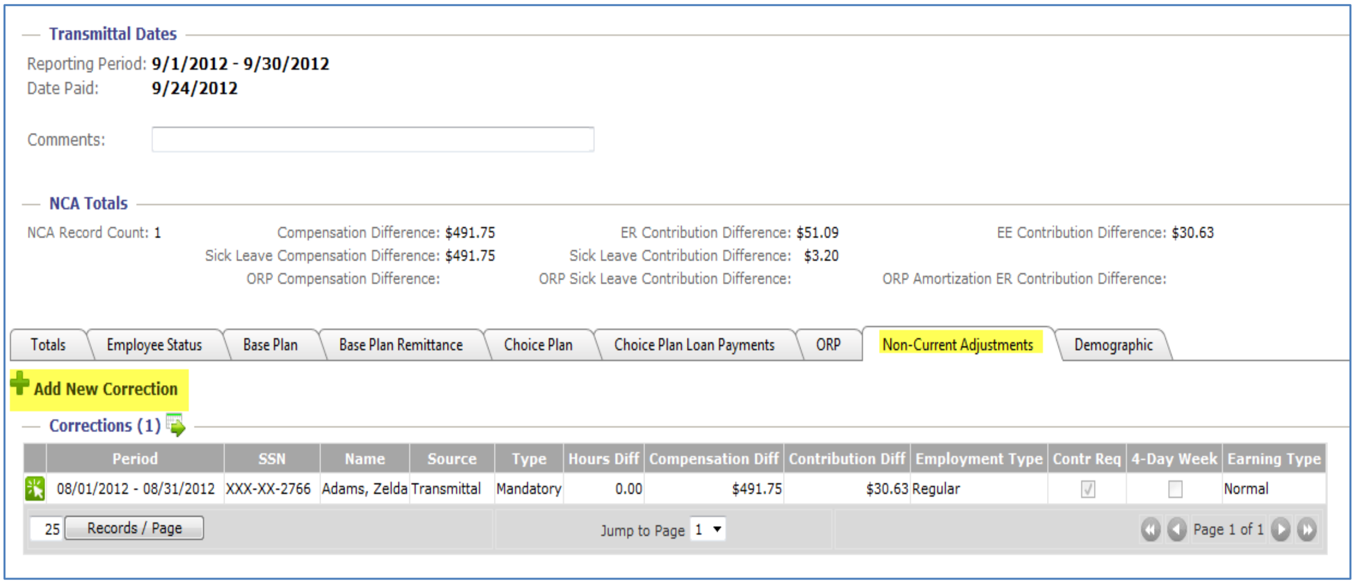
Adding Employee Non-Current Adjustment (NCA) Records

The *Non-Current Adjustment* tab can be used to add NCA records to correctly reflect an employee's contributions and compensation. To open the *Non-Current Adjustment* tab in a currently-open transmittal, perform the following:

1. Click **Reporting** on the main menu**.**
2. Click **Prepare Regular Transmittal** in the sub-menu.
3. Select the **Non-Current Adjustments** tab in the open transmittal.

Step 1: Click the Add New Correction Icon.

Click the **Add New Correction** icon in the *Non-Current Adjustments* tab.



➢ The *Make Corrections* page displays.

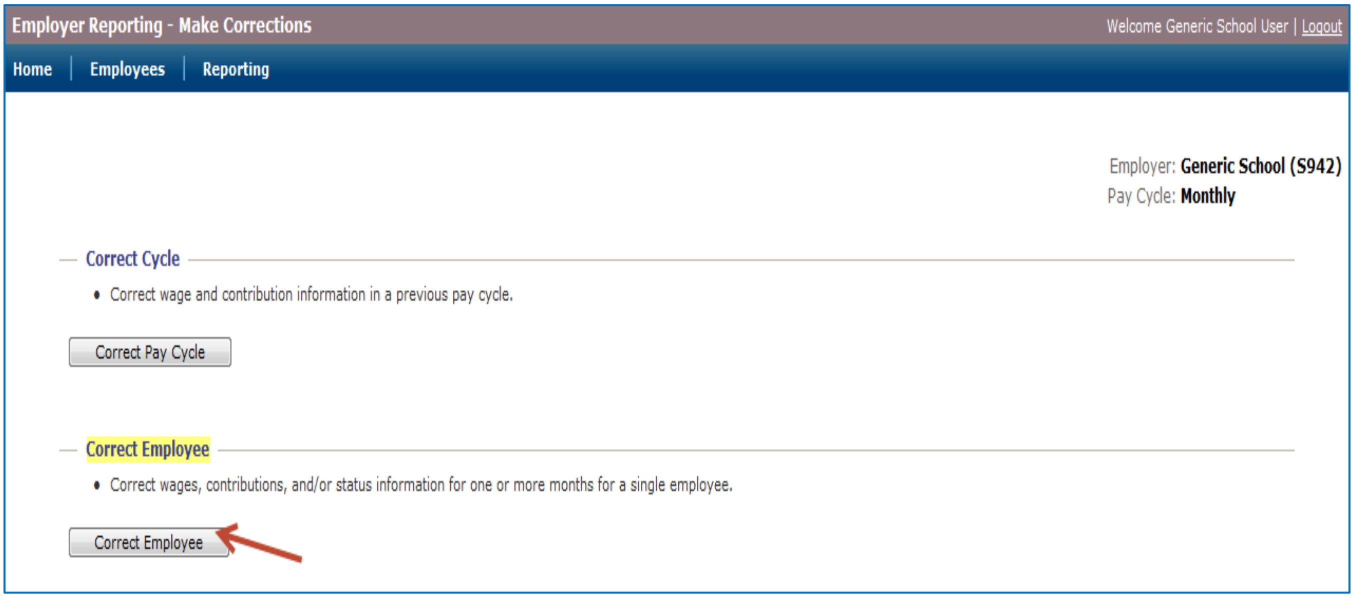
Step 2: Click Correct Employee.

The *Correct Employee* function in the *Make Corrections* page is used to correct an employee's history.

Note: An employer cannot make changes to an employee's history if the employee is currently in *Deceased*, *Separated*, or *Retired* status.

Note: Corrected data displays in the *Non-Current Adjustment* tab for the open transmittal.

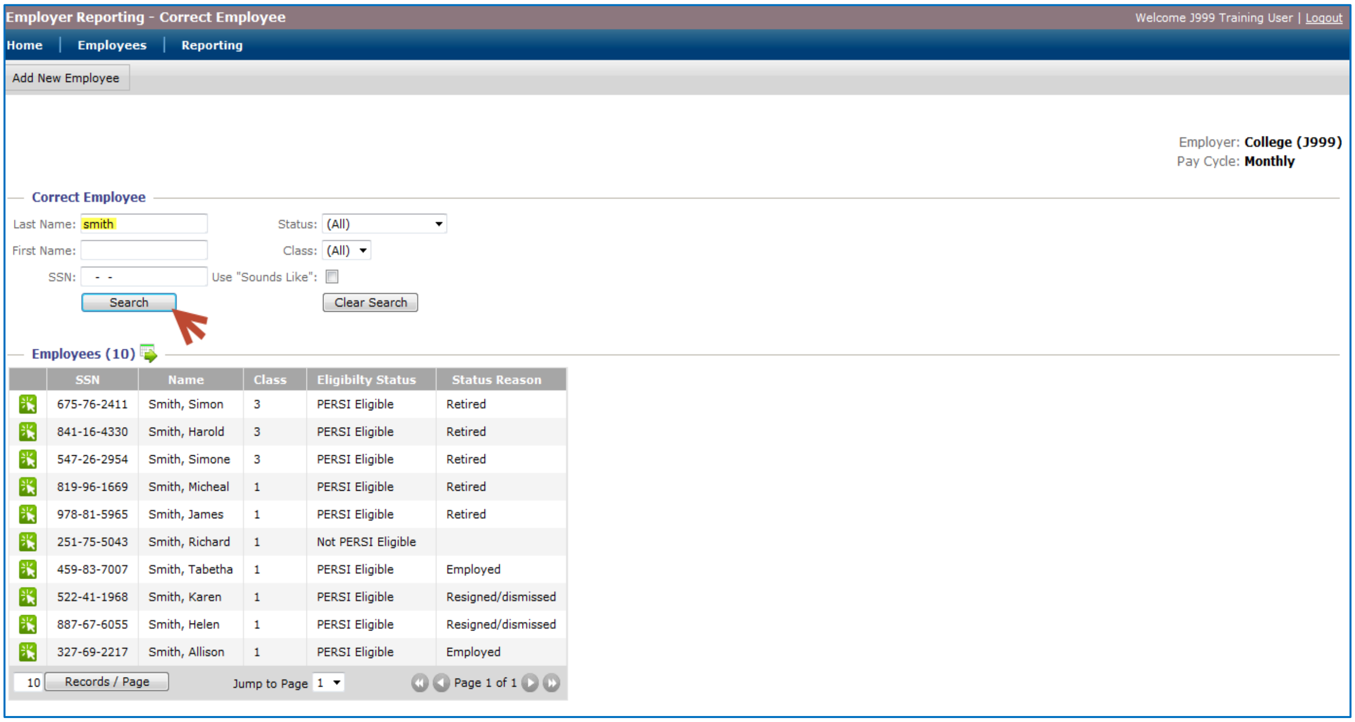
In the *Make Corrections* page, click **Correct Employee**.



➢ The *Employee Search/Results* page displays.

Step 3: Locate and select the employee.

The *Employee Search/Results* page is used to find and select the employee whose previously reported and posted transmittal information needs to be corrected.

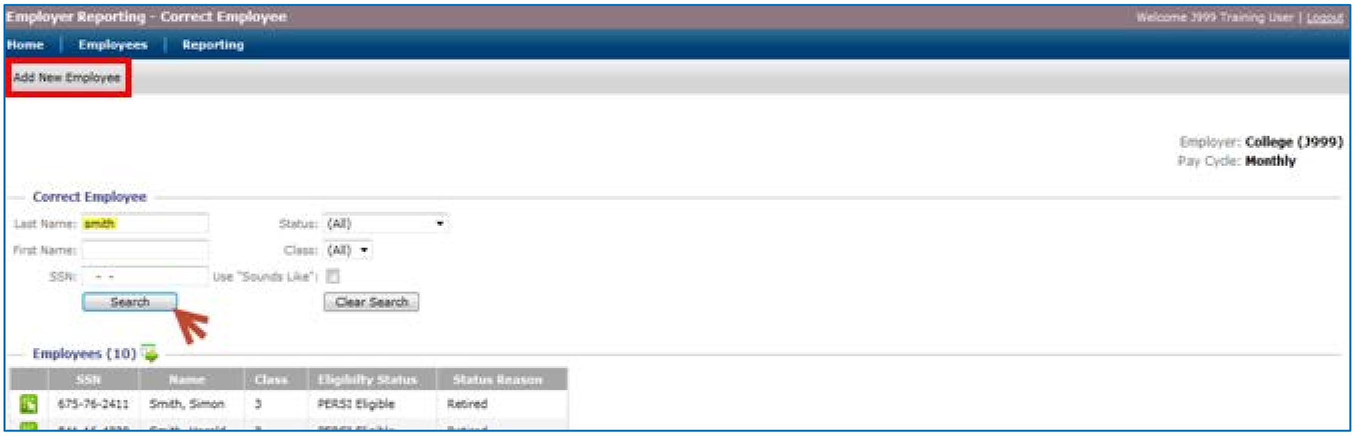


To use the *Employee Search/Results* page, perform the following to find and select the employee's historical information:

1. Enter data into one or more of the following fields:
   - **Last Name**: Type all or part of the employee's last name.
   - **First Name**: Type all or part of the employee's first name.
   - **SSN**: Type all or part of the employee's Social Security number.
   - **Status**: Select whether the employee is *PERSI Eligible* or *Not PERSI Eligible*.
   - **Class**: Select whether the employee is Class *A*, *B*, *D*, *E*, *1*, *2*, *3*, or *4*.
   - **Use "Sounds Like"**: Check the box if you want results that sound like the names you entered, even if they are not an exact match.
2. Click **Search**.
   - ➢ The search results display in the *Employees* grid.
3. Click the **Select** icon next to the appropriate employee. 
   - ➢ The employee's history displays on the *Correct Employee (Open Report)* page.

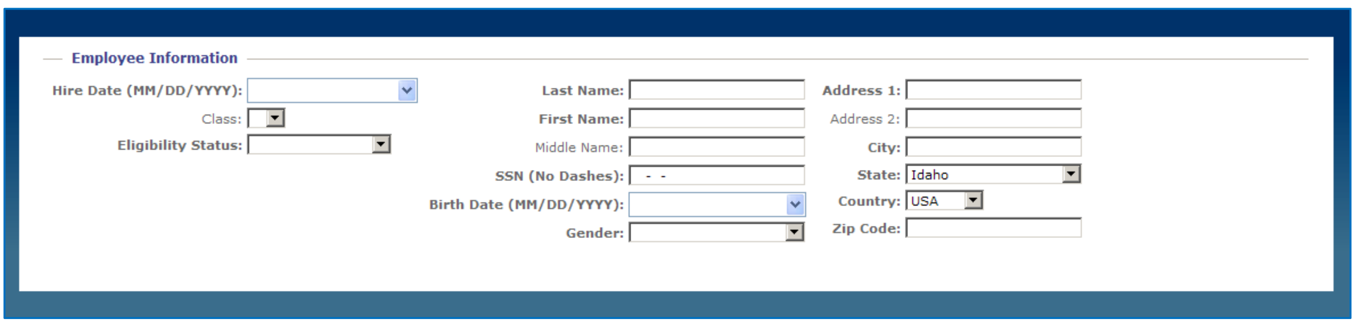
If the employee has never been reported in the system, add the employee as follows:

1. Click **Add New Employee** in the upper-left corner of the screen.

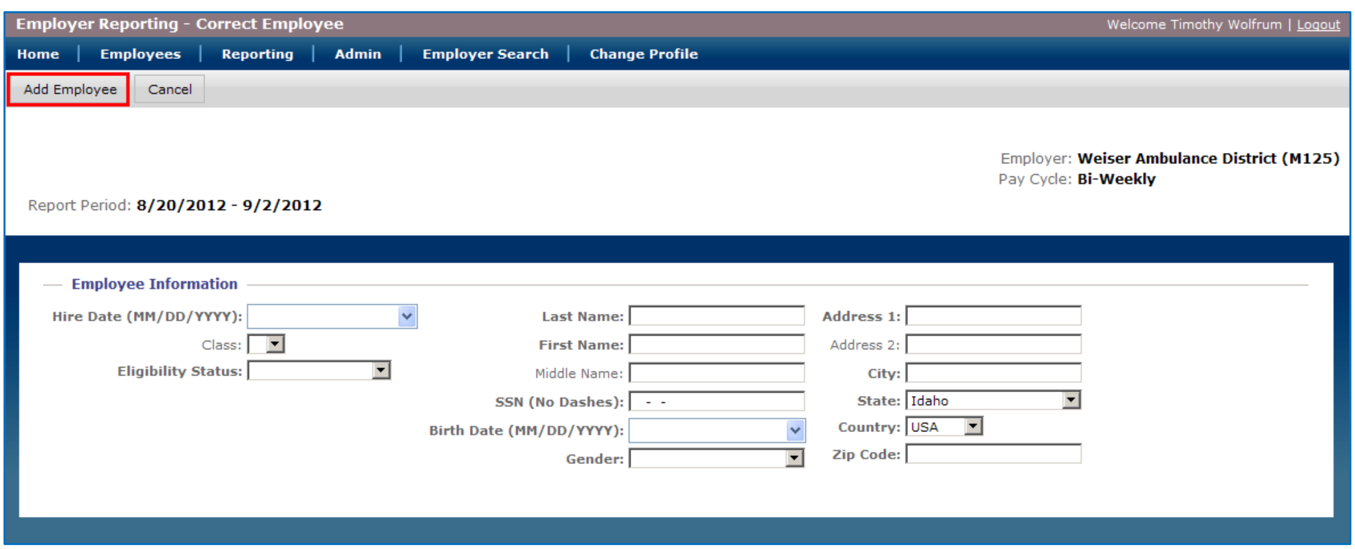


2. Fill in the appropriate information about the new employee.

   Note: Fields in bold are required.

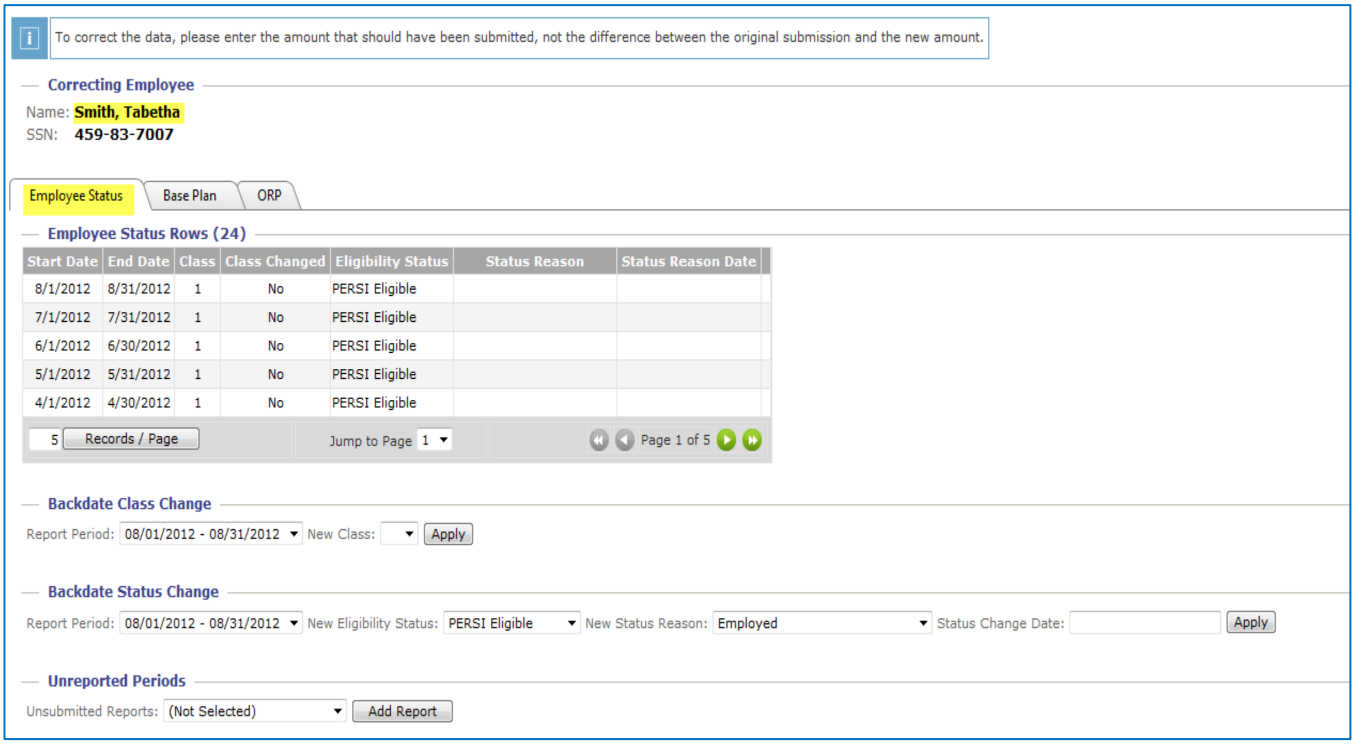


3. Click **Add Employee**.



Step 4: Modify the employee’s data for a pay cycle.

The *Correct Employee (Open Report)* page displays the historical data and relevant tabs for the selected employee. This page is used to correct the employee’s information and history. Click the appropriate tab to view and modify the information.



The *Employee Status* tab displays all the data for each pay cycle. Use the sections below the tab to modify the class and status for the employee, as well as add unreported periods.

- For example, if a person was hired 5 months ago and your employer just added them to the last transmittal, use the sections below the tab to add missing pay cycles to the individual’s history.

Use the *Backdate Class Change* section to change an employee’s class from a given transmittal period forward. To use this section, perform the following:

1. Select the **Report Period**.
2. Select the new **Class**.
3. Click **Apply**.
    - ➢ The new class replaces the original class from the selected reporting period through the most recent transmittal.

Step 4 (continued)

Use the *Backdate Status Change* section to change the employee's status from a given transmittal period forward. To use this section, perform the following:

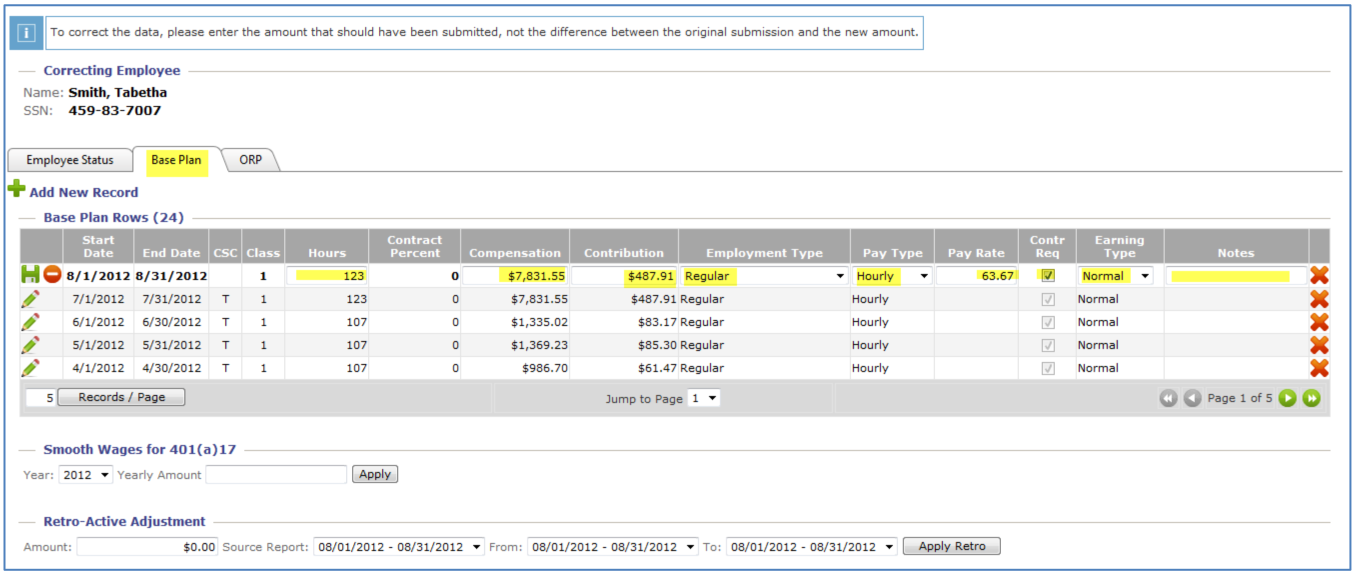
1. Select the **Report Period**.
2. Select the **New Eligibility Status**.
3. Select the **New Status Reason**.
4. Type the **Status Change Date**.
5. Click **Apply**.
   - ➢ The new status data replaces the original status data from the selected reporting period through the most recent transmittal.

Use the *Unreported Periods* section to add rows to the *Employee Status* tab. To use this section, perform the following:

1. Contact PERSI to update the employee's eligibility start date.
2. Select the reporting period(s) to be added in the **Unsubmitted Reports** field.
3. Click **Add Report**.
   - ➢ A new row displays on the *Employee Status* tab.
4. On the Base Plan tab select **Add New Record** icon (). Selecting the unreported periods from the drop down. Click **Add Record.**

Step 5: Modify the employee's historical Base Plan entries.

The *Base Plan* tab allows the user to view and modify historical Base Plan entries for the employee.



To modify historical Base Plan data for an employee, perform the following:

1. Click the **Edit** icon to make the row editable.
2. Perform the necessary changes.

   Note: Use the compensation and contribution amounts that should have been submitted, not the differences between the original amounts and the new amounts.

3. Choose one of the following options:
   - Click the **Save** icon to save the edited information and return the row to a non-editable state.
   - Click the **Cancel** icon to revert to the original data (undo your changes) and return the row back to a non-editable state.

Step 5 (continued)

If necessary, use the ancillary functions for corrections.

When the 401(a)17 limits are reached:

You can use the *Smooth Wages for 401(a)17* section when an employee has met the 401(a) 17 limit for the calendar year. To use this section within corrections, perform the following:

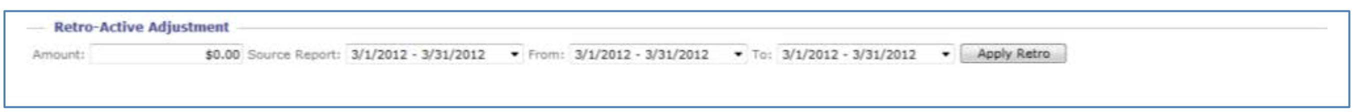
1. Select the **Year**.
   - ➢ The **Yearly Amount** defaults to the limit for the selected year.
2. Click **Apply**.
   - ➢ The employee's wages are evenly distributed based on the *Yearly Amount* limit.

To perform retroactive adjustments:

Use the *Retro-Active Adjustment* section to take part of the compensation in a given period and distribute it evenly throughout past periods. To use this section, perform the following:

1. Type the **Amount**.

   Note: This is the amount of the retroactive adjustment. It cannot be negative.
2. In the **Source Report** field, select the period to deduct the amount from.
3. In the **From** and **To** fields, select the beginning and ending periods to distribute the amount between.
4. Click **Apply Retro**.



   - ➢ The *Amount* is distributed evenly between the periods specified in the *From* and *To* fields, including the *From* and *To* transmittal periods.

Step 6: Submit your corrections.

After all of your corrections have been entered, click **Preview & Submit** in the action menu.

- The report is saved and then checked for errors.
- If no errors or warnings are found, the *Bill Summary* page displays.

i Any changes in payments (ER or EE contributions) due to corrections are due with the payment of the regular transmittal.

Category	Amount
Base Plan Bill	$514.98
Sick Leave Bill	$20.14
GRAND TOTAL BILL	**$535.12**

Base Plan

Transmittal Period	Class	Old Compensation	New Compensation	Old EE Contributions	New EE Contributions	EE Contribution Difference	Old ER Contributions	New ER Contributions	ER Contribution Difference	Total Bill
8/1/2012 - 8/31/2012	Class 1	$4,733.01	$7,831.55	$294.87	$487.91	$193.04	$491.76	$813.70	$321.94	$514.98
GRAND TOTALS		**$4,733.01**	**$7,831.55**	**$294.87**	**$487.91**	**$193.04**	**$491.76**	**$813.70**	**$321.94**	**$514.98**

Sick Leave

Transmittal Period	Old Compensation	New Compensation	Old ER Contributions	New ER Contributions	ER Contribution Difference	Total Bill
8/1/2012 - 8/31/2012	$4,733.01	$7,831.55	$30.76	$50.91	$20.14	$20.14
GRAND TOTALS	**$4,733.01**	**$7,831.55**	**$30.76**	**$50.91**	**$20.14**	**$20.14**

Optional Retirement Plan

Transmittal Period	Old Compensation	New Compensation	Sick Leave Old ER Contributions	Sick Leave New ER Contributions	Sick Leave ER Contribution Difference	Amortization Old ER Contributions	Amortization New ER Contributions	Amortization ER Contribution Difference	Total Bill
GRAND TOTALS	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**

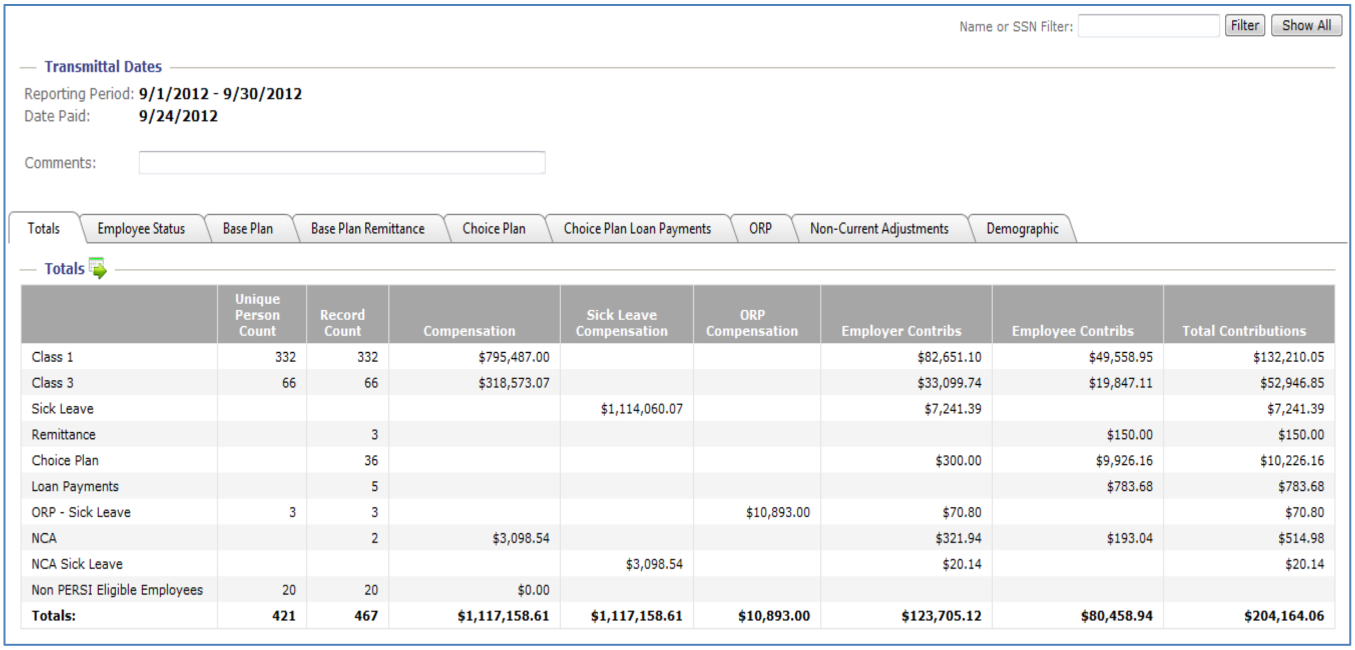
Create NCA Records | Return to Corrections

The *Bill Summary* page displays a grid showing the differences in compensation and contributions.

Step 7: Submit your changes to the NCA records.

If all compensation and contributions are correct, click **Create NCA Records**.

- The transmittal status changes to "Pending" and the *Non-Current Adjustments* tab in the regular transmittal shows the corrected rows for all of the corrected reports in pending status.


Name or SSN Filter: Filter Show All

Transmittal Dates

Reporting Period: **9/1/2012 - 9/30/2012**
Date Paid: **9/24/2012**

Comments:

Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Totals

	Unique Person Count	Record Count	Compensation	Sick Leave Compensation	ORP Compensation	Employer Contribs	Employee Contribs	Total Contributions
Class 1	332	332	$795,487.00			$82,651.10	$49,558.95	$132,210.05
Class 3	66	66	$318,573.07			$33,099.74	$19,847.11	$52,946.85
Sick Leave				$1,114,060.07		$7,241.39		$7,241.39
Remittance		3					$150.00	$150.00
Choice Plan		36				$300.00	$9,926.16	$10,226.16
Loan Payments		5					$783.68	$783.68
ORP - Sick Leave	3	3			$10,893.00	$70.80		$70.80
NCA		2	$3,098.54			$321.94	$193.04	$514.98
NCA Sick Leave				$3,098.54		$20.14		$20.14
Non PERSI Eligible Employees	20	20	$0.00					
Totals:	**421**	**467**	**$1,117,158.61**	**$1,117,158.61**	**$10,893.00**	**$123,705.12**	**$80,458.94**	**$204,164.06**

If the compensation and contributions are not correct, click **Return to Corrections.**

- The report returns to the *Correct Employee (Open Report)* page to allow additional corrections.

Accessing the Make Corrections Page Directly

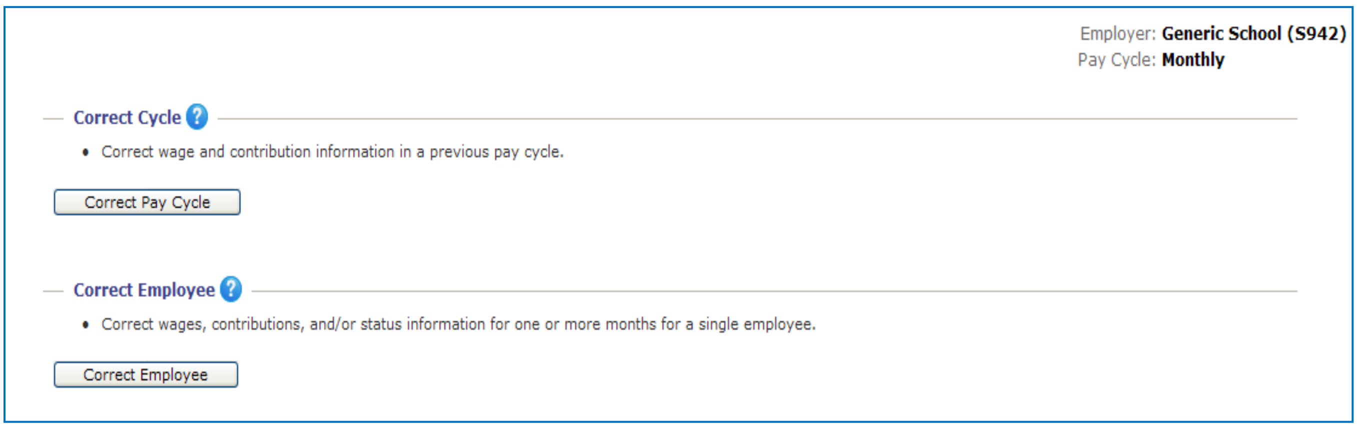
The *Make Corrections* page displays the data originally reported in the transmittal. You can use this page to modify the data to what should have been submitted. This modified data is then changed into non-current adjustment (NCA) records.

The *Make Corrections* page allows the user to either correct a pay cycle (opening the *Correct Pay Cycle* page or correct an employee (opening the *Correct Employee* page).

Note: Corrected data displays in the *Non-Current Adjustment* tab for the open transmittal.

To open the *Make Corrections* page, perform the following:

1. Click **Reporting** in the main menu.
2. Click **Make Corrections**.
   - ➢ The *Make Corrections* page displays.



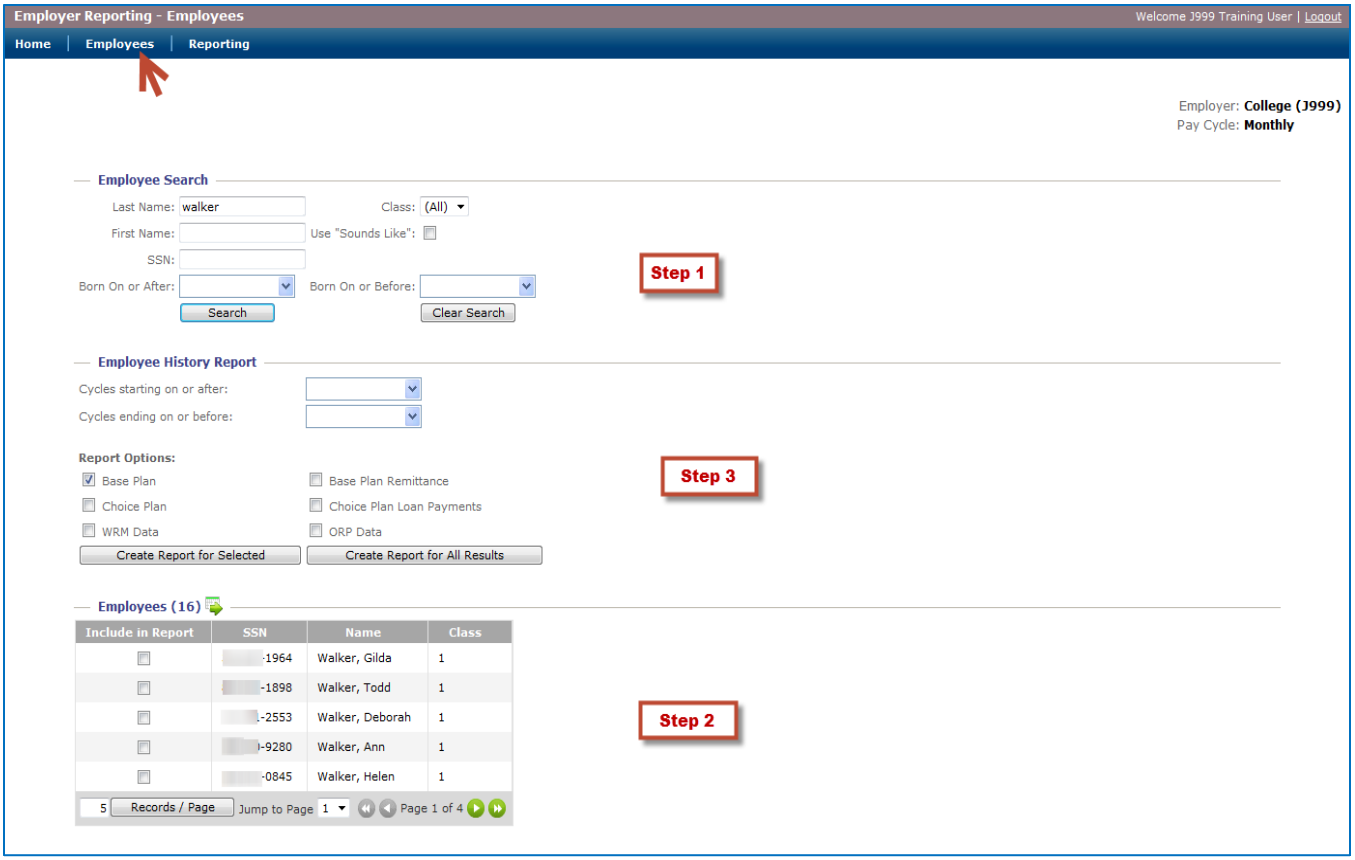
From this point forward, the steps for correcting an employee's historical information are the same as in steps 2 through 7 of *Adding Employee Non-Current Adjustment (NCA) Records*. Proceed to *Step 2: Click Correct Employee* and continue through *Step 7: Submit your changes to the NCA records*.

Chapter 5: Exception Processes

Using the Employees Page

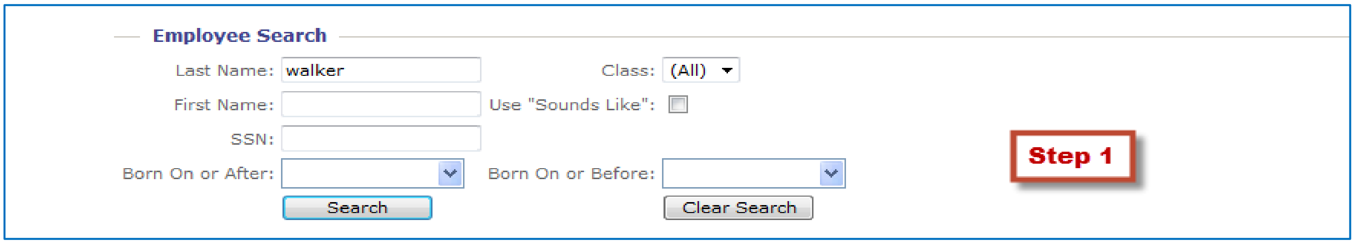
The *Employees* page is used to create reports for specific employees based on a date range.

To open this page, click **Employees** in the main menu.



Step 1: Use the Employee Search section.

Use the *Employee Search* section to search for a specific, active employee using various criteria. To use this section, perform the following:

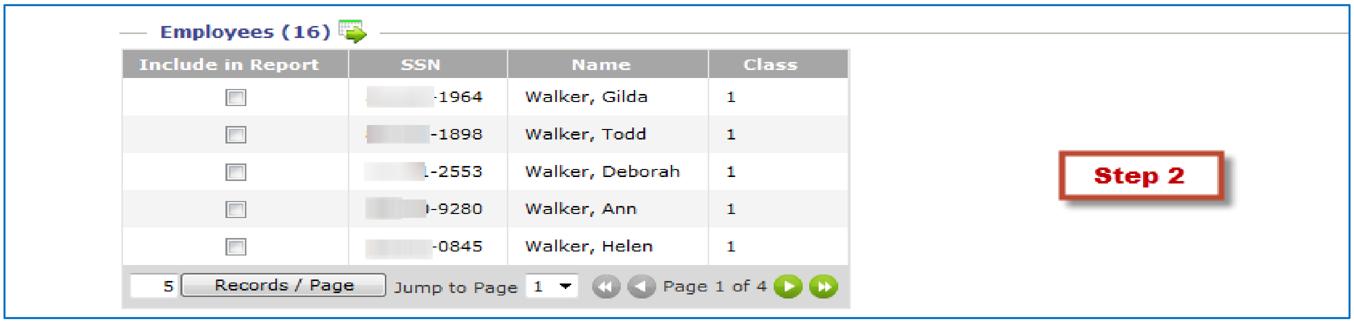


1. Enter data into one or more of the following fields:
   - **Last Name**: Type all or part of the employee's last name.
   - **First Name**: Type all or part of the employee's first name.
   - **SSN**: Type all or part of the employee's Social Security number.
   - **Class**: Select whether the employee is Class *A*, *B*, *D*, *E*, *1*, *2*, *3*, or *4*.
   - **Use "Sounds Like"**: Check the box if you want results that sound like the names you entered, even if they are not an exact match.
   - **Born On or After: Select a date to limit the search to employees born on or after that date.**
   - **Born On or Before**: Select a date to limit the search to employees born on or before that data.
2. Click **Search** to perform the search or **Clear Search** to clear the search criteria fields.
   - ➢ A successful search displays results in the *Employees* grid.

   Note: If all search fields are left empty, an "ERROR – Valid Search Criteria Must Be Entered" message displays at the top of the screen to notify you to enter valid search criteria.

   Note: If more than 300 results are returned, a message displays to indicate that you may need to refine your search.

Step 2: Select the employee from the Employees grid.

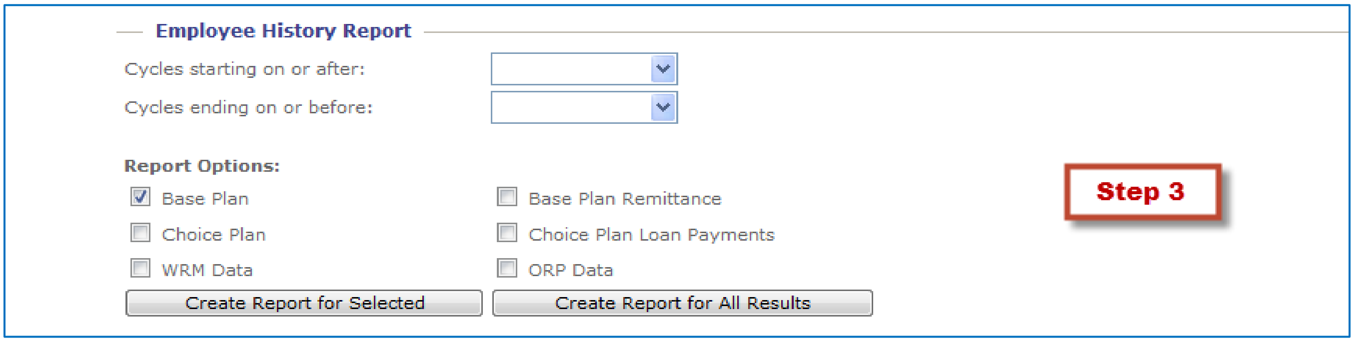


After a successful search with valid criteria, the *Employees* grid displays a list of all employees that fit the specified criteria. Use this grid to select the employees you want to display in the report by performing the following:

- Check the **Include in Report** box for each employee you want to include.

  Note: If multiple employees are selected, multiple reports will be created. Each report is sorted by employee and plan type.

Step 3: Choose report type and date range to return.

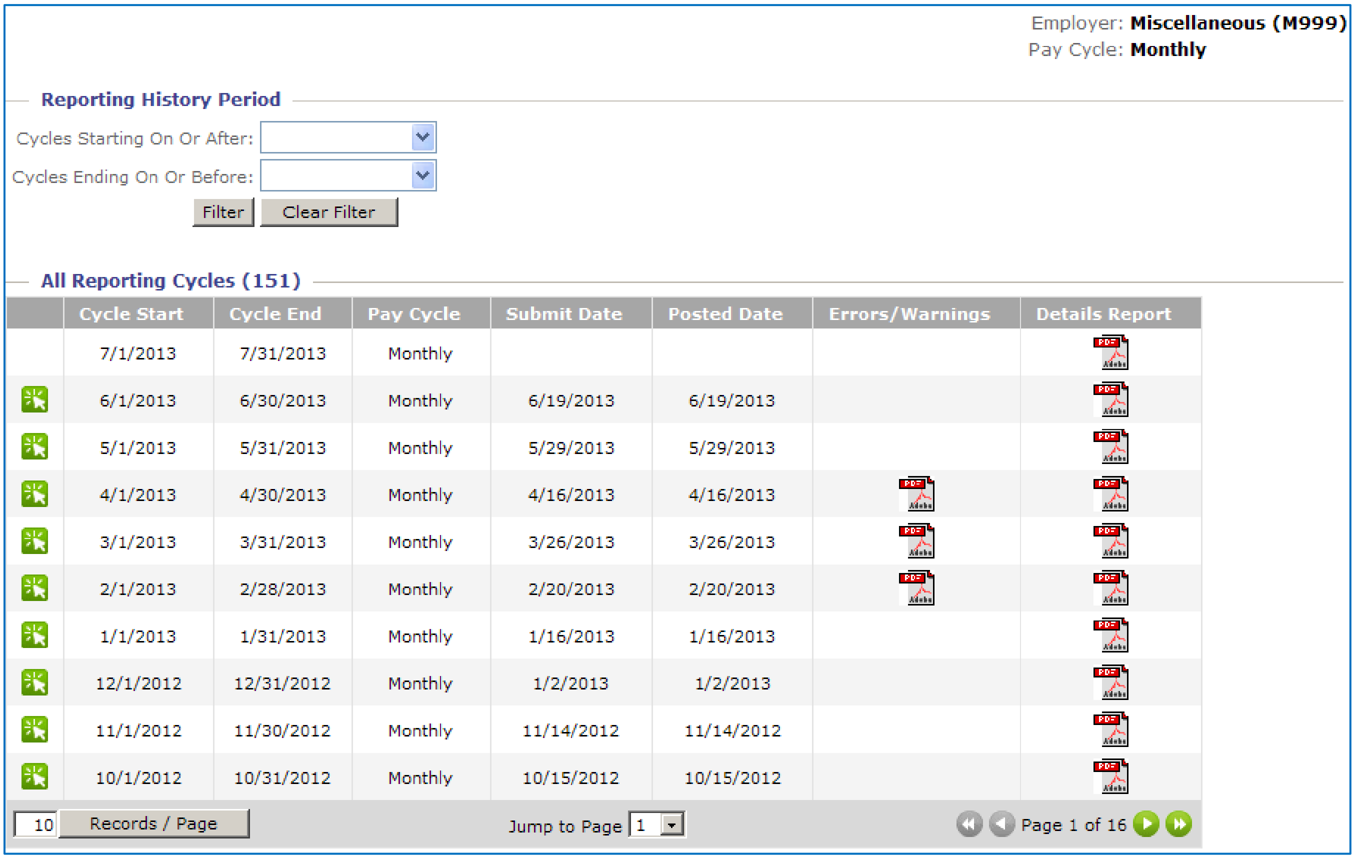


The *Employee History Report* section generates a wage/contribution history report for a specific period using the employees selected in the *Employees* grid. Use this section to choose the date range and type of report to create by performing the following:

1. Enter dates into the following fields:
    - **Cycles starting on or after**: Type or select a beginning date for your report.
    - **Cycles ending on or before**: Type or select an end date for your report.
2. Check the boxes to select from the following *Report Options*:
    - **Base Plan**
    - **Choice Plan**
    - **WRM Data**
    - **Base Plan Remittance**
    - **Choice Plan Loan Payments**
    - **ORP Data**

    Note: You can select any combination of *Report Options*; the associated data will be generated.
3. Click **Create Report for Selected** to generate the reports for your specific selections or **Create Report for All Results** to generate reports for all possible selections.

Using the Reporting History Page



	Cycle Start	Cycle End	Pay Cycle	Submit Date	Posted Date	Errors/Warnings	Details Report
	7/1/2013	7/31/2013	Monthly				
	6/1/2013	6/30/2013	Monthly	6/19/2013	6/19/2013		
	5/1/2013	5/31/2013	Monthly	5/29/2013	5/29/2013		
	4/1/2013	4/30/2013	Monthly	4/16/2013	4/16/2013		
	3/1/2013	3/31/2013	Monthly	3/26/2013	3/26/2013		
	2/1/2013	2/28/2013	Monthly	2/20/2013	2/20/2013		
	1/1/2013	1/31/2013	Monthly	1/16/2013	1/16/2013		
	12/1/2012	12/31/2012	Monthly	1/2/2013	1/2/2013		
	11/1/2012	11/30/2012	Monthly	11/14/2012	11/14/2012		
	10/1/2012	10/31/2012	Monthly	10/15/2012	10/15/2012		

The *Reporting History* page lists all reports submitted through Arrivos.

To open the *Reporting History* page, perform the following:

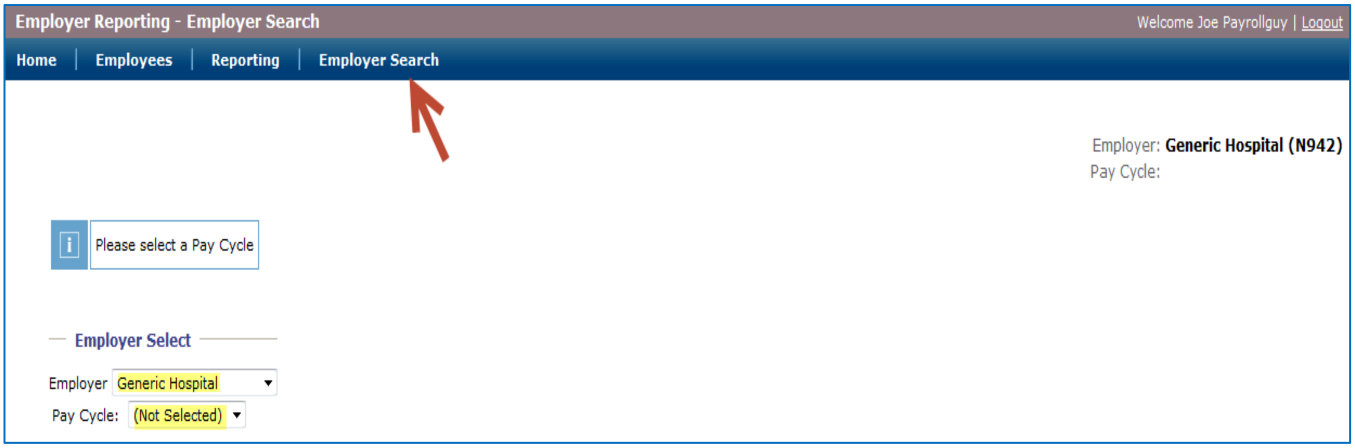
1. Click **Reporting** in the main menu.
2. Click **Reporting History**.
   - ➢ The *Reporting History* page displays.

Within the *Reporting History* page, perform the following actions to see more information on a particular report:

- Click the **Select** icon to view a read-only version of a given report.
- Click the icon in the **Details Report** field to view a printer-friendly PDF file for a given report.
- Click the icon in the **Errors/Warnings** field to view the errors and warnings associated with a given report when it was submitted.

Using the Employer Search Page

The *Employer Search* page only displays for users who report for multiple employers, such as third-party users who report for more than one employer.



The *Employer Search* page displays when an authorized employer contact is responsible for sending transmittals for more than one employer to PERSI. This page requires the authorized contact to select an employer first, so it is the contact's default page upon log in.

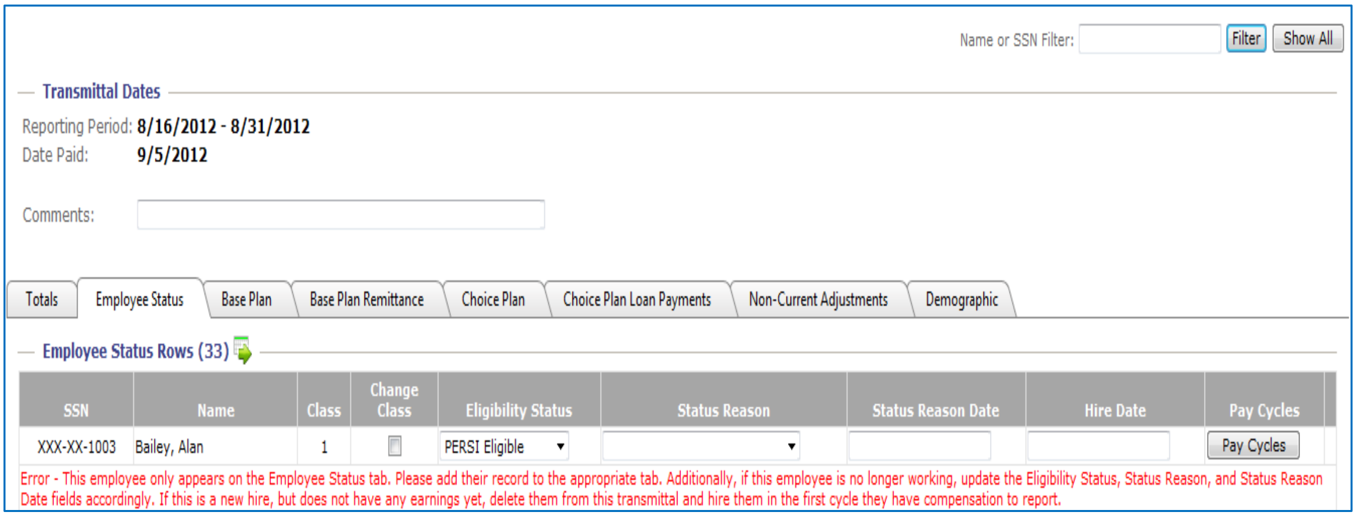
This page can also be launched in order to switch employers by clicking **Employer Search** in the main menu. Perform the following to complete the process:

1. In the **Employer** field, select the appropriate employer.
2. In the **Pay Cycle** field, select the appropriate pay cycle.
   - When both items have been selected, the *Home Page* launches with information displayed for the selected employer.

Correcting a Missing Person Error

If Arrivos detects a missing person issue on the *Status* tab when you click **Check for Errors**, Arrivos displays the following message:

- "Error – This employee only appears on the Employee Status tab. Please add their record to the appropriate tab. Additionally, if this employee is no longer working, update the Eligibility Status, Status Reason, and Status Reason Date fields accordingly. If this is a new hire, but does not have any earnings yet, delete them from this transmittal and hire them in the first cycle they have compensation to report."



Missing person errors display in one of two scenarios:

- A roll-forward employer has accidentally deleted an employee from a tab, such as the *Base Plan* tab.
- An upload employer has loaded a file without an employee who was active in the last transmittal.

In either scenario, Arrivos pulls the employee onto the *Status* tab so you can account for the difference between the current transmittal and the last one. However, if you do not know about the issue, you might not check the *Status* tab. For this reason, Arrivos displays the error.

To correct this error, perform one of the following actions:

- If the employee is still active and was simply missed on one or more tabs, add the employee to the appropriate tabs, or
- Change the **Eligibility Status**, **Status Reason**, and **Status Date** fields for the employee as appropriate.

Adding an Existing Employee (Rehire)

The *Add Existing Employee* function on the action menu searches for an employee who is not in the current open transmittal, but who has been on transmittals in the past, and then adds that employee as a new row on the tab and grid you are currently viewing.

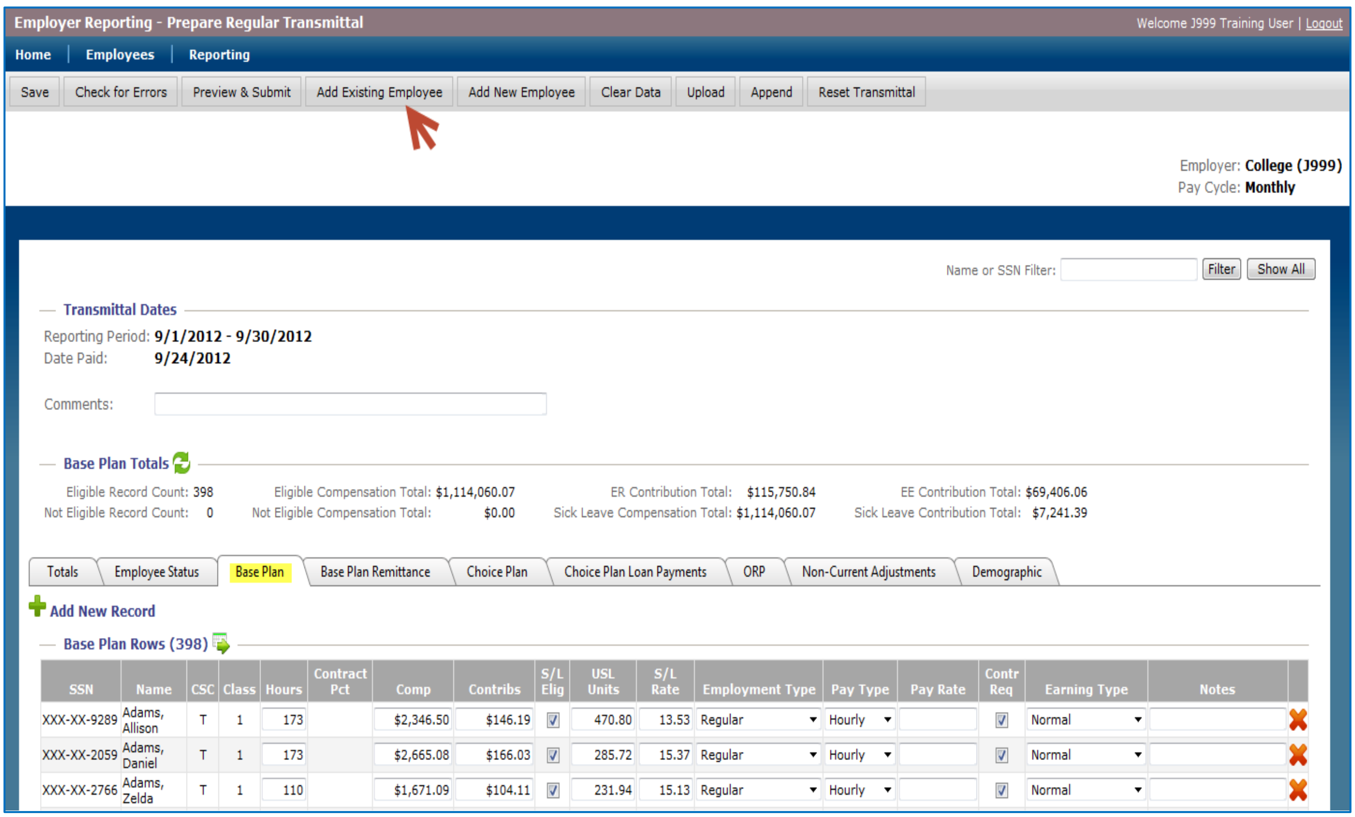
Note: If a terminated employee is being rehired, use this function to put them back on the transmittal where you can update the employee's *Eligibility Status* to the appropriate value and the *Status Reason* to **Employed** and the status reason date to the rehire date on the *Employee Status* tab.

Note: If there are any changes to the employee's address information, be sure to update the employee's demographic information on the *Demographic* tab.

To use the *Add Existing Employee* function, perform the following steps:

Step 1: Click Add Existing Employee.

Click **Add Existing Employee** on the action menu.

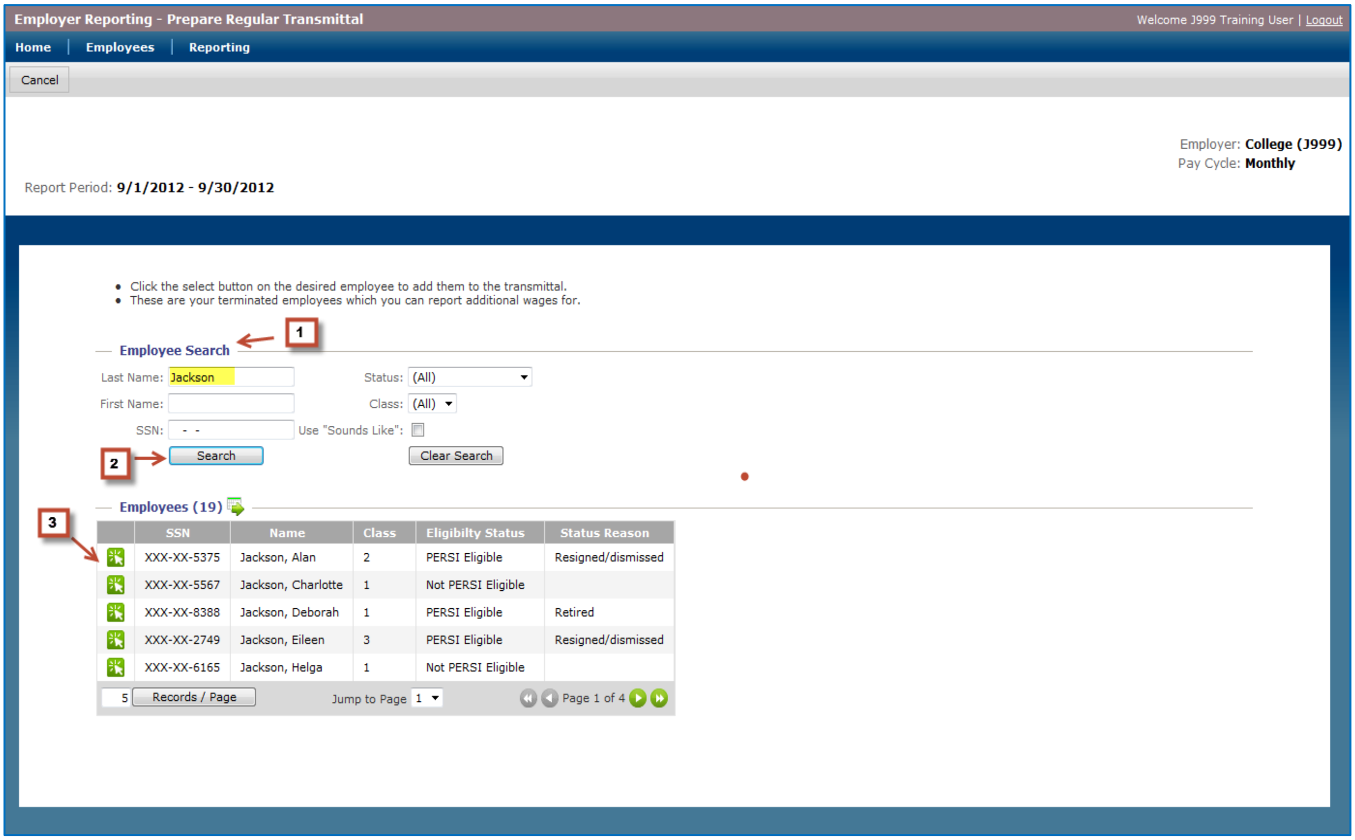


SSN	Name	CSC	Class	Hours	Contract Pct	Comp	Contribs	S/L Elig	USL Units	S/L Rate	Employment Type	Pay Type	Pay Rate	Contr Req	Earning Type	Notes
XXX-XX-9289	Adams, Allison	T	1	173		$2,346.50	$146.19	☑	470.80	13.53	Regular	Hourly		☑	Normal	
XXX-XX-2059	Adams, Daniel	T	1	173		$2,665.08	$166.03	☑	285.72	15.37	Regular	Hourly		☑	Normal	
XXX-XX-2766	Adams, Zelda	T	1	110		$1,671.09	$104.11	☑	231.94	15.13	Regular	Hourly		☑	Normal	

- ➢ The *Employee Search* page displays.
- ➢ If an active employee is missing from the upload file, he or she is automatically pulled into the open transmittal.

Step 2: Locate and select the employee.

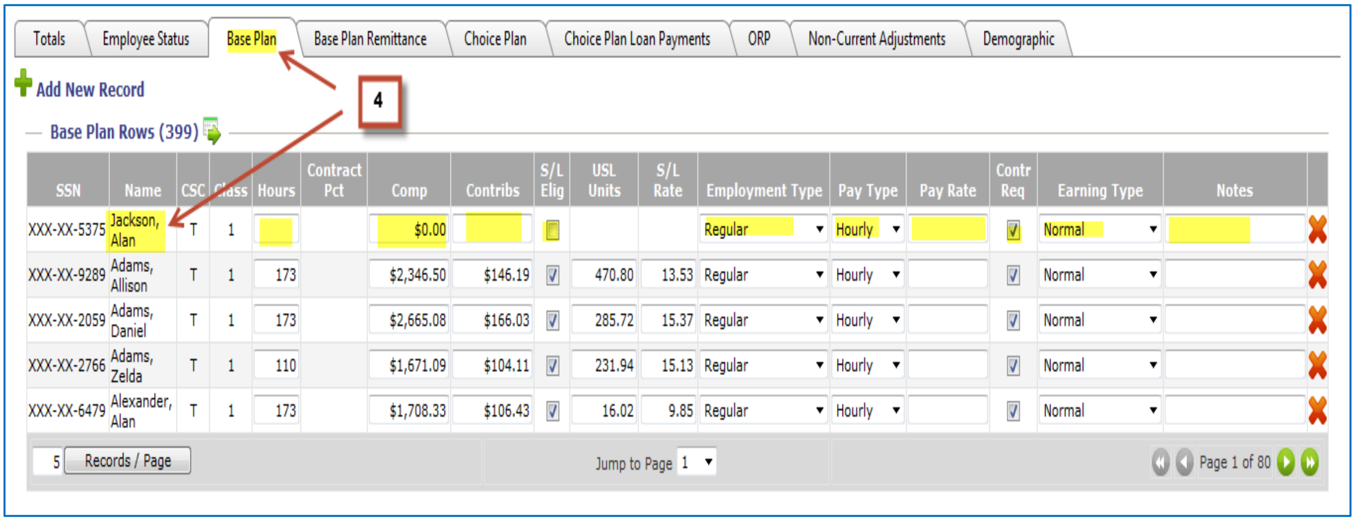
Use the *Employee Search* page to search for a terminated or retired employee by performing the following:



1. Enter data into one or more of the following fields:
   - **Last Name**: Type all or part of the employee's last name.
   - **First Name**: Type all or part of the employee's first name.
   - **SSN**: Type all or part of the employee's Social Security number.
   - **Status**: Select whether the employee is *PERSI Eligible* or *Not PERSI Eligible*.
   - **Class**: Select whether the employee is Class *A*, *B*, *D*, *E*, *1*, *2*, *3*, or *4*.
   - **Use "Sounds Like"**: Check the box if you want results that sound like the names you entered, even if they are not an exact match.
2. Click **Search**.
   - ➢ The search results display in the *Employees* grid.
3. Click the **Select** icon to pull the employee back into the transmittal. 
   - ➢ The employee is added as a new row on the tab and grid you were viewing when you clicked **Add Existing Employee**.

Step 3: Provide contribution data.

Enter the existing employee's data on the *Base Plan* tab, including *Compensation*, *Contributions*, *Pay Rate*, and other items.



Note: If you click **Add Existing Employee** from either the *Totals* tab, *Employee Status* tab, or the *Demographic* tab, and then add the employee to the report, the employee does not show up on any of the detail tabs (i.e., the *Base Plan*, *Base Plan Remittance*, *Choice Plan*, *Loan Payments*, *WRM*, or *ORP* tabs).

The existing employee does show up on the *Employee Status* and *Demographic* tabs, but needs to be manually added to one of the detail tabs using the *Add New Record* icon ().

Transmittals are validated upon submission to tell you if you have an employee in the report that does not appear on any of the detail tabs.

Military Leave Scenarios

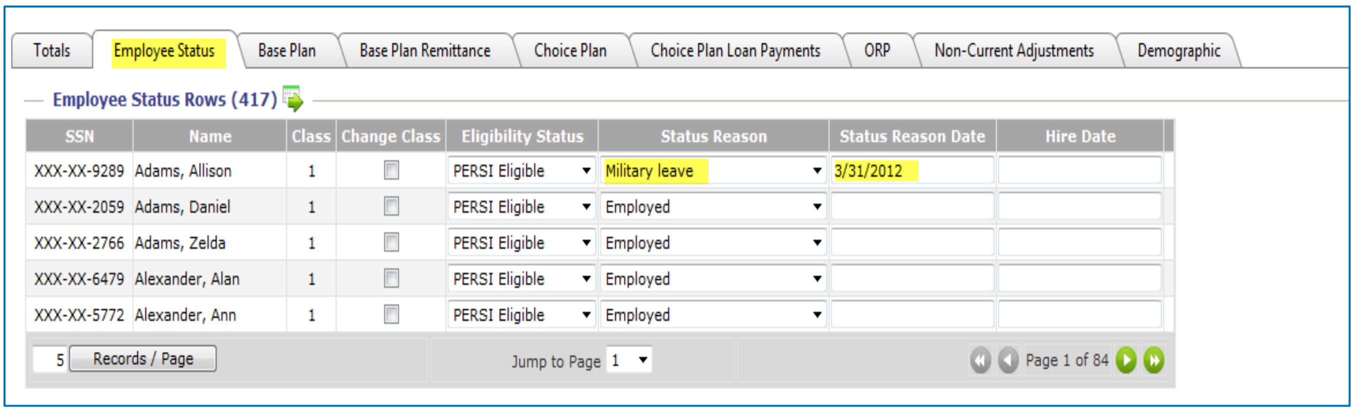
Scenario 1

Employee goes on military leave > Returns 4 years later.

When an active employee goes on military leave and then returns from military leave 4 years later, the employer proceeds as shown in the following examples:

Month 1—March 2012. The employee goes on military leave on 3/31/2012. The employer performs the following in the *Employee Status* tab:

1. Selects **Military leave** in the *Status Reason* field for the employee.
2. Types **3/31/2012** in the *Status Reason Date* field for the employee.

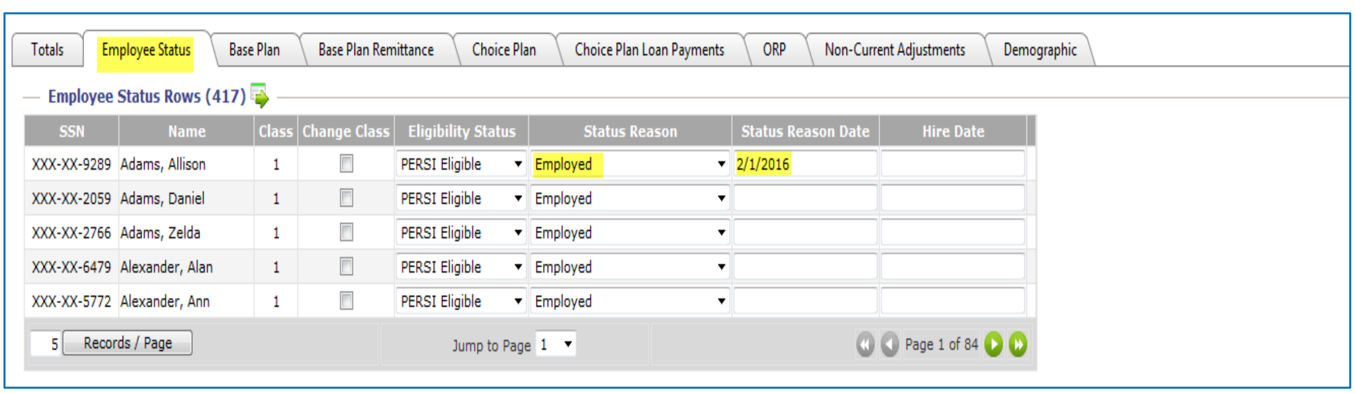


SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Military leave	3/31/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible	Employed		
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible	Employed		
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible	Employed		
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible	Employed		

Month 2—April 2012. The employee appears on the transmittal in April with the updated information until he or she returns in February 2016.

Month 48—February 2016. The employee returns from leave on 2/1/2016.The employer performs the following in the *Employee Status* tab:

1. Selects **Employed** in the *Status Reason* field for the employee.
2. Types **2/1/2016** in the *Status Reason Date* field for the employee.



SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Employed	2/1/2016	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible	Employed		
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible	Employed		
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible	Employed		
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible	Employed		

Scenario 2

Employee goes on military leave > Employer terminates the employee after 2 years because the employee does not plan to return to work.

When an employer terminates an employee after 2 years because he or she is back from military leave but will not return to work, the employer proceeds as shown in the following examples:

Month 1—March 2012. The employee goes on military leave. The employer performs the following in the *Employee Status* tab:

1. Selects **Military leave** in the *Status Reason* field for the employee.
2. Types **3/31/2012** in the *Status Reason Date* field for the employee.

Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Military leave	3/31/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible	Employed		
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible	Employed		
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible	Employed		
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible	Employed		

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Months 2 through 23—April 2012 through February 2014. The employee appears on the transmittal file as above.

Month 24—March 2014. The employee informs the employer that he or she does not intend to return to work for the employer. The employer performs the following in the *Employee Status* tab to terminate the employee:

1. Selects **Resigned\dismissed** in the *Status Reason* field for the employee.
2. Types **3/1/2014** in the *Status Reason Date* field for the employee.

Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Resigned/dismissed	3/1/2014	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible	Employed		
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible	Employed		
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible	Employed		
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible	Employed		

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Tracking Workers Compensation

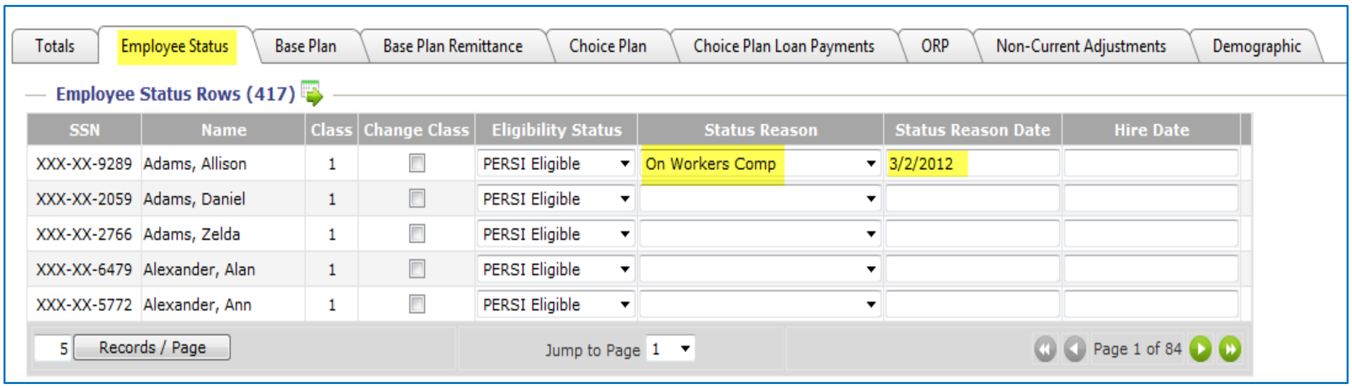
Workers Compensation (Not Made Whole)

Scenario: Employee goes on Workers Compensation (not made whole) and returns in 6 months.

When an employee goes on Workers Compensation (not made whole) and returns in 6 months, the employer proceeds as shown in the following examples:

Month 1—March 2012. The employee goes on Workers Compensation (not made whole) on 3/2/2012. The employer performs the following in the *Employee Status* tab:

1. Selects **On Workers Comp** in the *Status Reason* field for the employee.
2. Types **3/2/2012** in the *Status Reason Date* field for the employee.



Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	On Workers Comp	3/2/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible			
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible			
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible			
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible			

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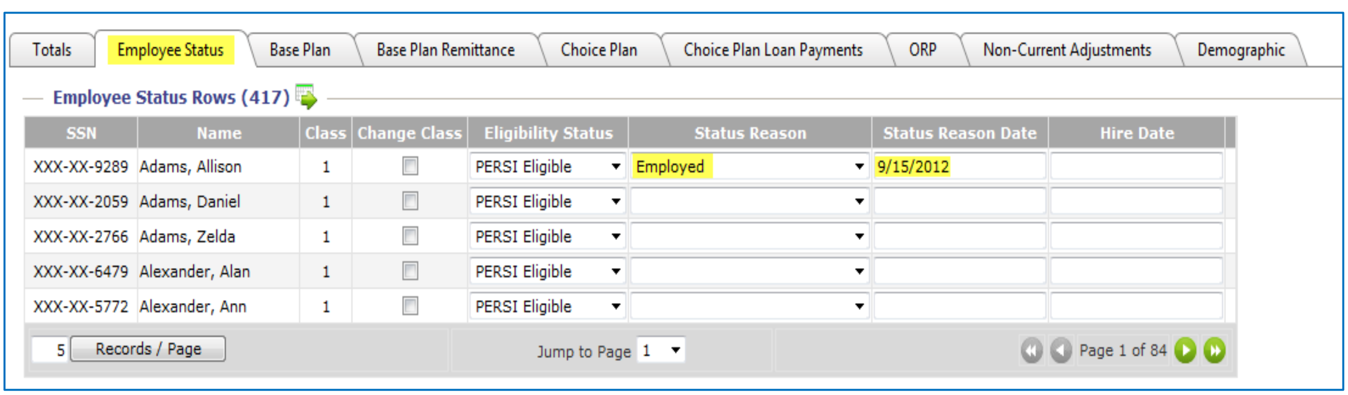
Months 2 through 5—April 2012 through August 2012. The employee appears on the transmittal with zeroes for all fields.

Month 6—September 2012. The employee returns from Workers Compensation on 9/15/2012.The employer performs the following in the *Employee Status* tab:

1. Selects **Employed** in the *Status Reason* field for the employee.
2. Types **9/15/2012** in the *Status Reason Date* field for the employee.



Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Employed	9/15/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible			
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible			
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible			
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible			

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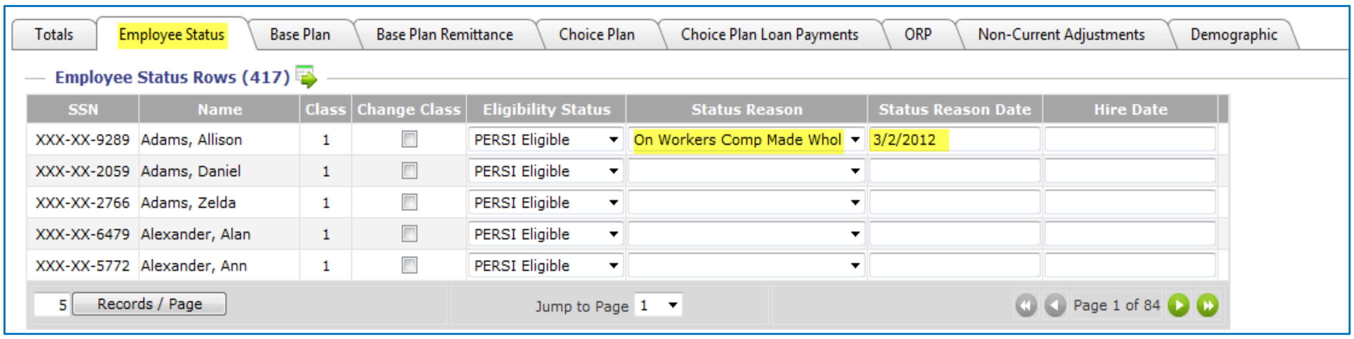
Workers Compensation (Made Whole)

Scenario: Employee goes on Workers Compensation (made whole) and returns in 6 months.

Month 1—March 2012. The employee goes on Workers Compensation (made whole) on 3/2/2012. The employer performs the following in the *Employee Status* tab:

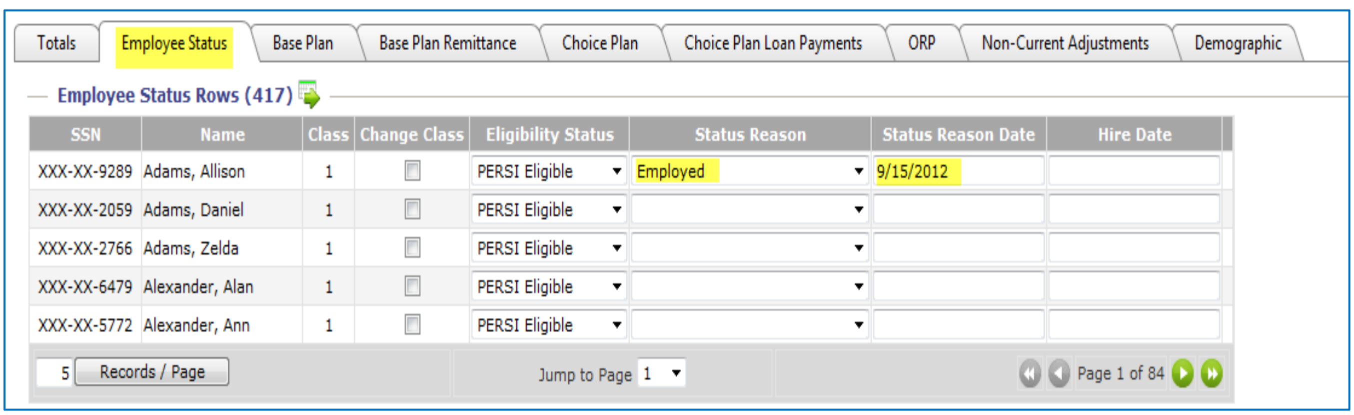
1. Selects **On Workers Comp Made Whole** in the *Status Reason* field for the employee.
2. Types **3/2/2012** in the *Status Reason Date* field for the employee.



Months 2 through 5—April 2012 through August 2012. The employee appears on the transmittal with compensation and contributions listed.

Month 6—September 2012. The employee returns from Workers Compensation on 9/15/2012.The employer performs the following in the *Employee Status* tab:

1. Selects **Employed** in the *Status Reason* field for the employee.
2. Types **9/15/2012** in the *Status Reason Date* field for the employee.

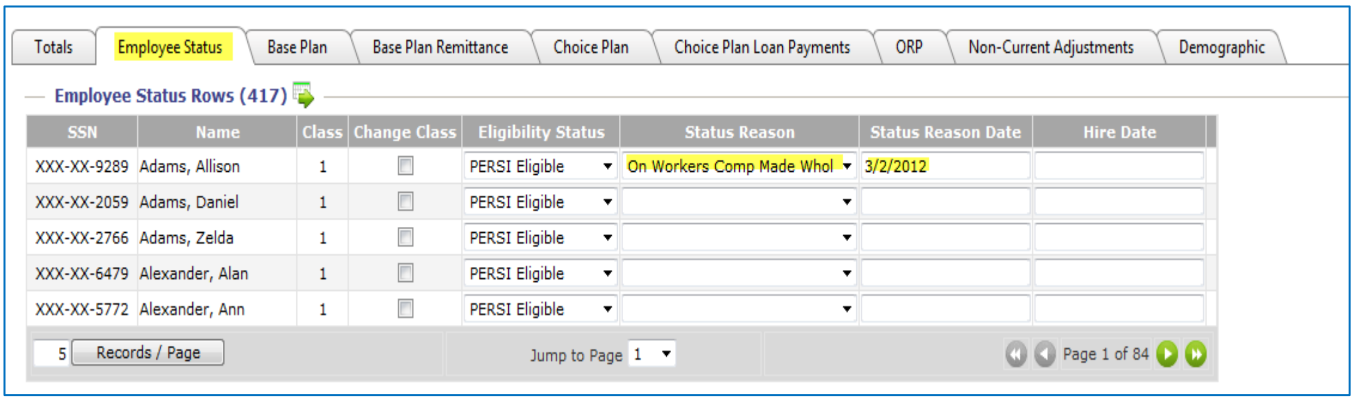


Workers Compensation (Does Not Return)

Scenario: Employee goes on Workers Compensation (made whole or not) and informs the employer after 6 months that he or she is not returning to work.

Month 1—March 2012. The employee goes on Workers Compensation on 3/2/2012. The employer performs the following in the *Employee Status* tab:

1. Selects **On Workers Comp** or **On Workers Comp Made Whole** (depending on the case) in the *Status Reason* field for the employee.
2. Types **3/2/2012** in the *Status Reason Date* field for the employee.



Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

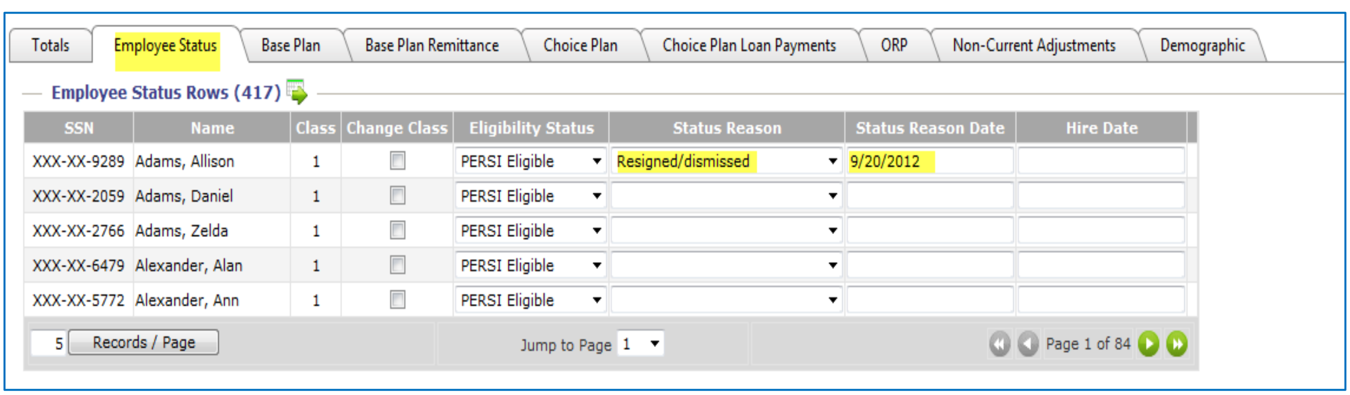
SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	On Workers Comp Made Whol	3/2/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible			
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible			
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible			
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible			

5 Records / Page | Jump to Page 1 | Page 1 of 84

Months 2 through 5—April 2012 through August 2012. The employee continues to appear on the transmittal.

Month 6—September 2012. The employee informs the employer that he or she is quitting on 9/20/2012.The employer performs the following in the *Employee Status* tab:

1. Selects **Resigned\dismissed** in the *Status Reason* field for the employee.
2. Types **9/20/2012** in the *Status Reason Date* field for the employee.



Totals | Employee Status | Base Plan | Base Plan Remittance | Choice Plan | Choice Plan Loan Payments | ORP | Non-Current Adjustments | Demographic

Employee Status Rows (417)

SSN	Name	Class	Change Class	Eligibility Status	Status Reason	Status Reason Date	Hire Date
XXX-XX-9289	Adams, Allison	1		PERSI Eligible	Resigned/dismissed	9/20/2012	
XXX-XX-2059	Adams, Daniel	1		PERSI Eligible			
XXX-XX-2766	Adams, Zelda	1		PERSI Eligible			
XXX-XX-6479	Alexander, Alan	1		PERSI Eligible			
XXX-XX-5772	Alexander, Ann	1		PERSI Eligible			

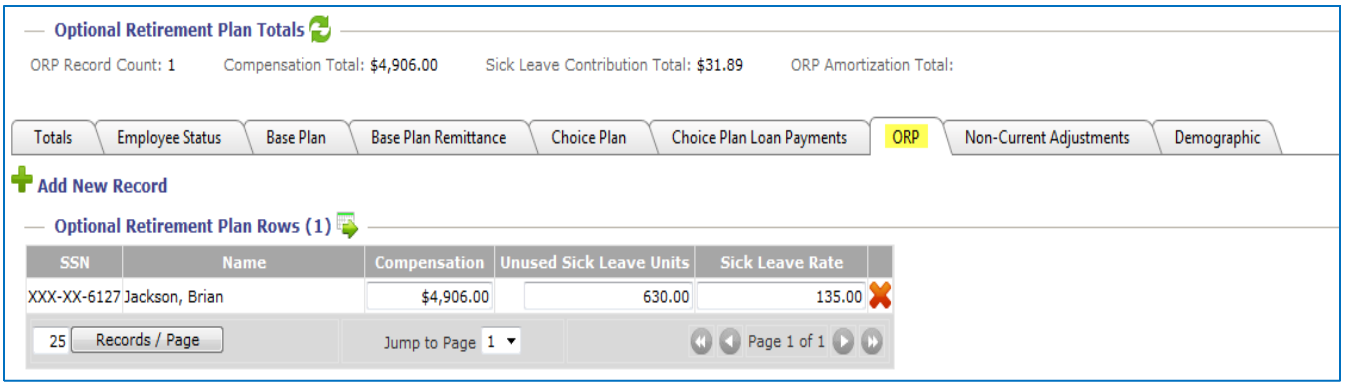
5 Records / Page | Jump to Page 1 | Page 1 of 84

Using the ORP Tab

The *ORP* tab lists all employees in the current transmittal who are in the Optional Retirement Plan.

Above the tab, the *Optional Retirement Plan Totals* section displays the record count, compensation total, sick leave contribution total, and ORP amortization total.

The *Optional Retirement Plan Rows* grid includes the *SSN*, *Name*, *Compensation*, *Unused Sick Leave Units*, and *Sick Leave Rate* for each employee.



Use this tab to add or delete records from the *Optional Retirement Plan Rows* or edit the following fields:

- **Compensation:** Type the dollar amount of this employee's compensation for the reported period.
- **Unused Sick Leave Units:** Type the number of sick leave days or hours the employee has accrued.
- **Sick Leave Rate:** Type the daily or hourly rate associated with the unused sick leave units.

To add a new record to the *Optional Retirement Plan Rows*, perform the following:

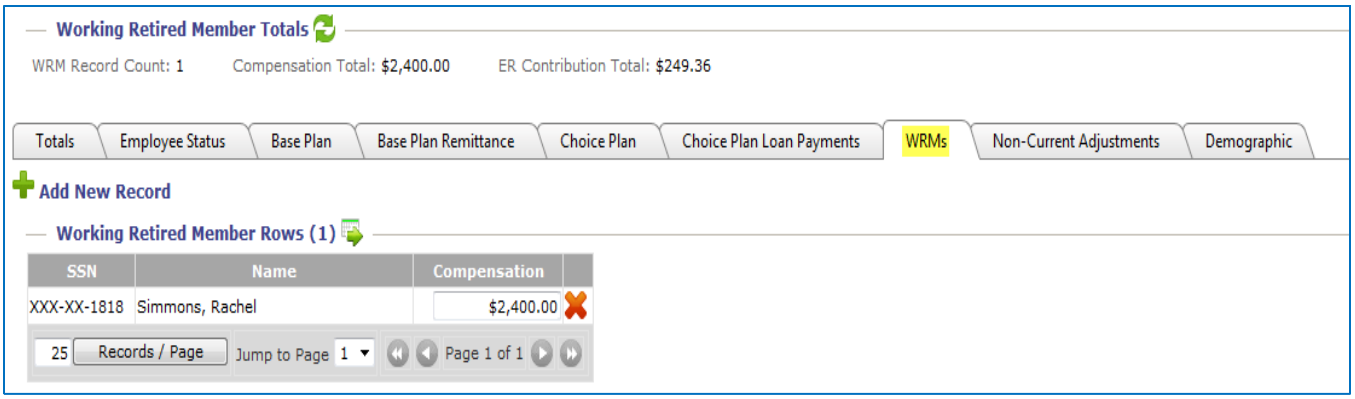
1. Click the **Add New Record** icon.
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item.
5. Enter the appropriate data.

Using the WRMs Tab

The *WRMs* tab lists all Working Retired Members in the current transmittal.

Above the tab, the *Working Retired Member Totals* section shows the record count, compensation total, and employer contribution total.

The *Working Retired Member Rows* grid includes *SSN*, *Name*, and *Contribution* (this grid automatically defaults to 25 records per page).



Use this tab to add or delete records from the *Working Retired Member Rows* or edit the following field:

- **Compensation:** Type the dollar amount of this employee's compensation for the reported period.

To add a new record to the *Working Retired Member Rows*, perform the following:

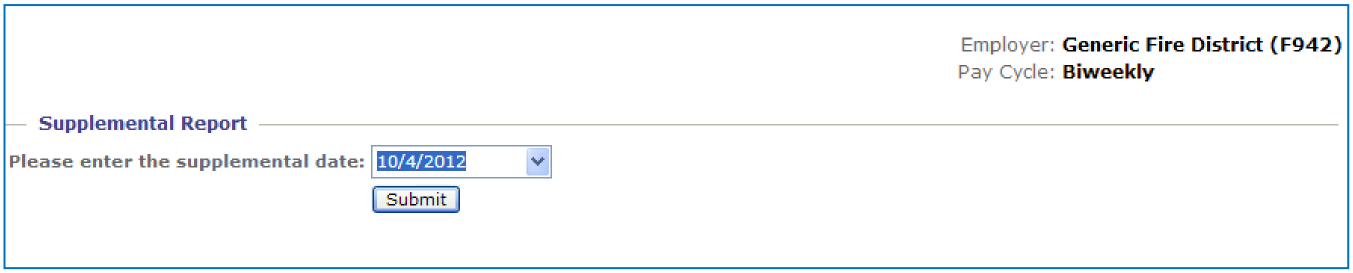
1. Click the **Add New Record** icon.
2. Enter the appropriate data.
3. Click **Search**.
4. Click the **Select** icon for the appropriate item.
5. Enter the appropriate data.

Preparing a Supplemental Transmittal

A supplemental transmittal is the same as a regular transmittal, except that a supplemental transmittal is used to submit a transmittal for a single date; for example, a transmittal for a bonus payroll.

To start a supplemental transmittal, perform the following:

1. Click **Reporting** on the main menu**.**
2. Click **Prepare Supplemental Transmittal** in the sub menu.
   - ➢ The *Supplemental Report* page displays.



3. In the **Please enter the supplemental date** field, type or select a date for the transmittal.
4. Click **Submit**.
   - ➢ If the employer is an upload employer, the *Regular Transmittal Upload* page displays. Proceed as shown on page 11.
   - ➢ If the employer is a roll-forward employer, the *Prepare Regular Transmittal* page displays. Proceed as shown on page 12.

Correcting a Pay Cycle

Opening the Make Corrections Page

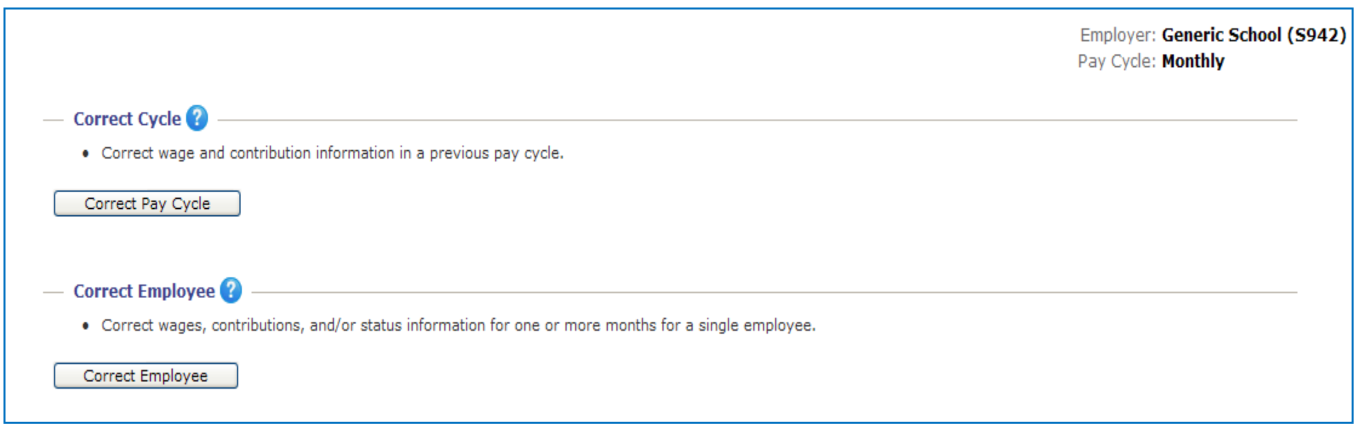
The *Make Corrections* page displays the data originally reported in the transmittal. You can use this page to modify the data to what should have been submitted. This modified data is then changed into non-current adjustment (NCA) records.

The *Make Corrections* page allows the user to either correct a pay cycle (opening the *Correct Pay Cycle* page or correct an employee (opening the *Correct Employee* page). The *Correct Pay Cycle* function allows you to correct an entire pay cycle for multiple employees without the need to retrieve each one individually.

Note: Corrected data displays in the *Non-Current Adjustment* tab for the open transmittal.

To open the *Make Corrections* page, perform the following:

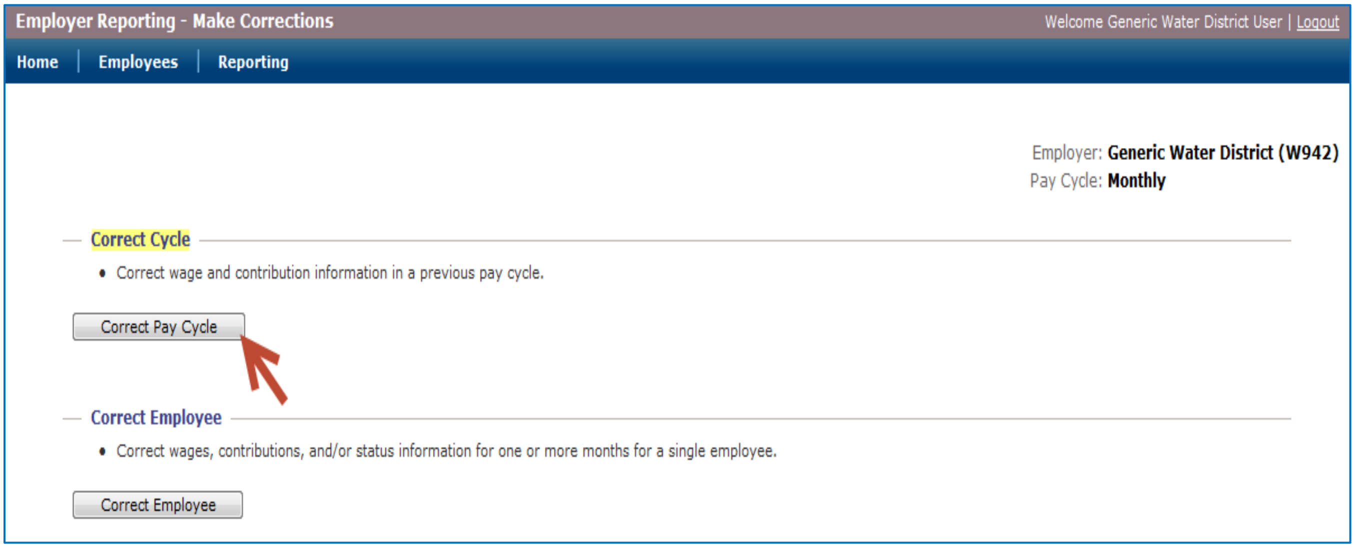
1. Click **Reporting** in the main menu.
2. Click **Make Corrections**.
   - ➢ The *Make Corrections* page displays.



Step 1: Click Correct Pay Cycle.

The *Correct Pay Cycle* function in the *Make Corrections* page is used to correct an employee's history.

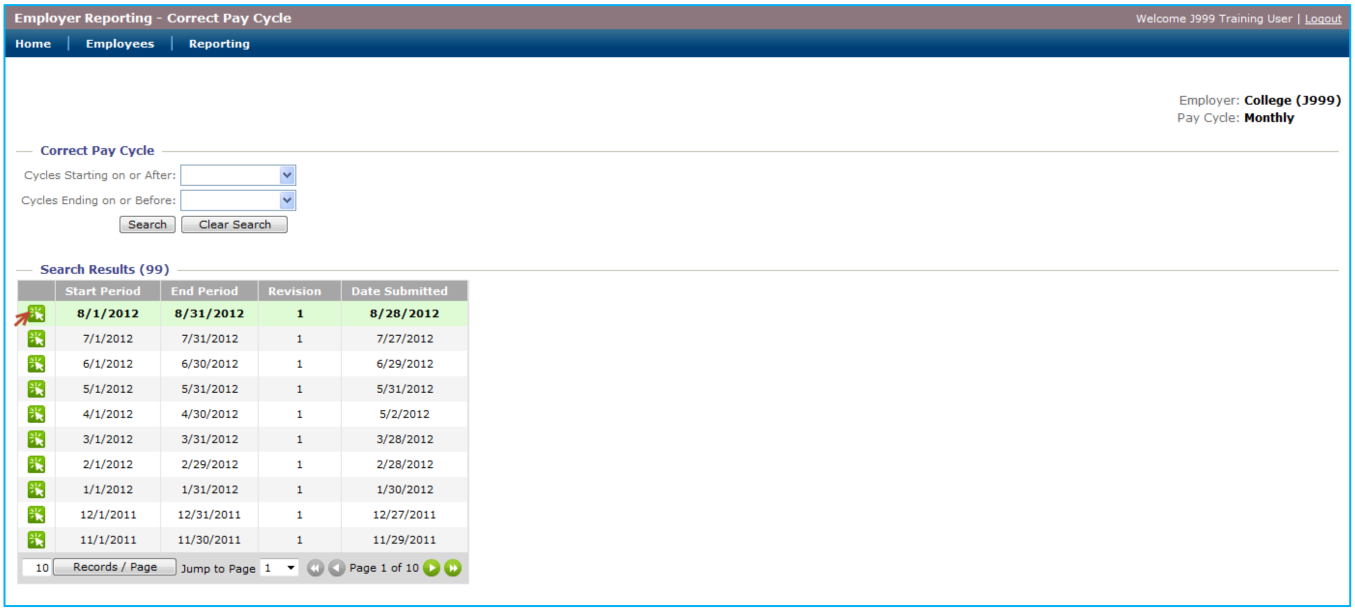
In the *Make Corrections* page, click **Correct Pay Cycle**.



➢ The *Correct Pay Cycle* page displays.

Step 2: Locate and select the pay cycle.

The *Correct Pay Cycle* filter page is used to select the pay cycle you want to make corrections for.

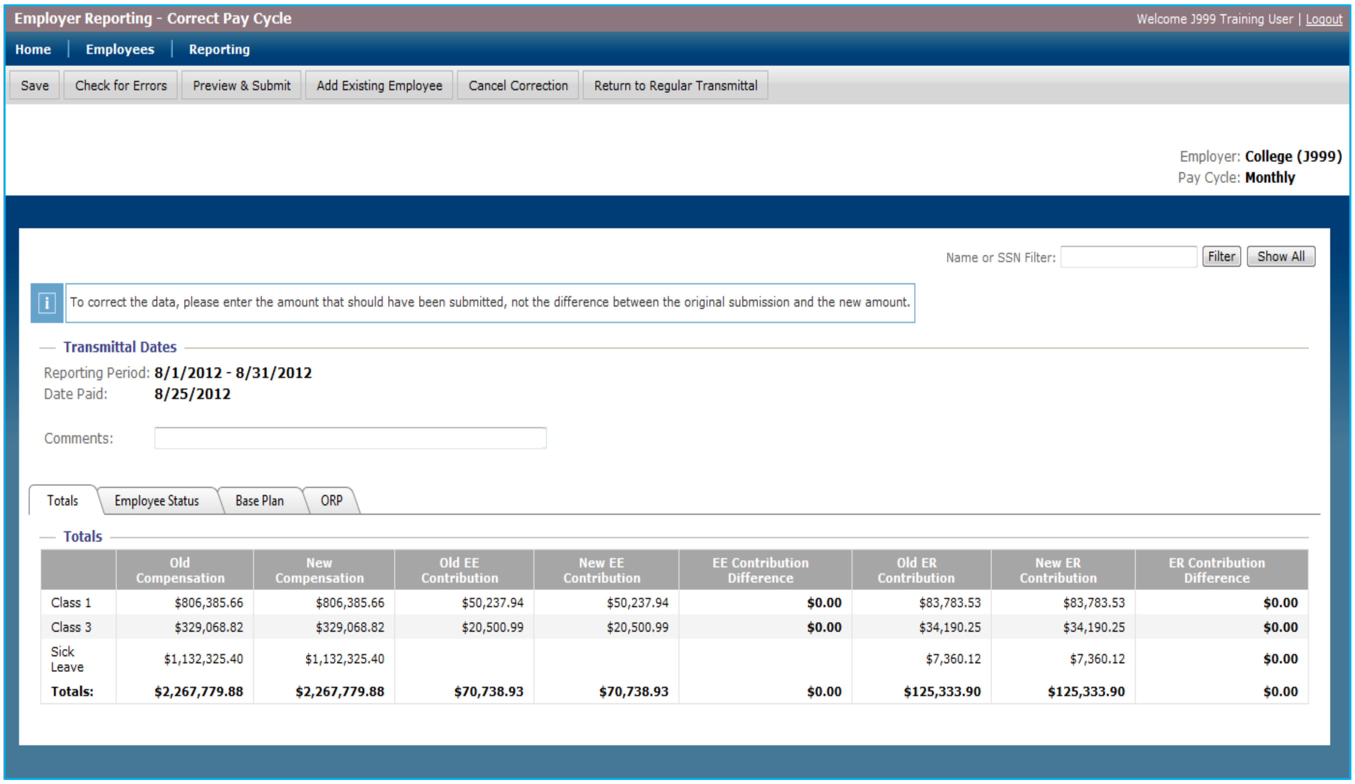


In the *Correct Pay Cycle* filter page, find and select the appropriate pay cycle. If the pay cycle is not visible, perform the following:

1. Enter data into one of the following fields:
   - o **Cycles Starting on or After:** Type or select a date to limit the search to cycles starting on or after that date.
   - o **Cycles Ending on or Before:** Type or select a date to limit the search to cycles ending on or before that date.
2. Click **Search**.
   - ➢ The search results display in the *Search Results* grid, sorted with the most-recent pay cycle first.
3. When the appropriate pay cycle is displayed, click the **Select** icon next to the pay cycle. 
   - ➢ The pay cycle displays on the *Correct Pay Cycle (Open Report)* page.

Step 3: Review the Correct Pay Cycle (Open Report) Page.

The *Correct Pay Cycle (Open Report)* page displays the data submitted for the selected transmittal in the relevant tabs: *Totals*, *Employee Status*, *Base Plan*, *WRMs*, *and ORP.*

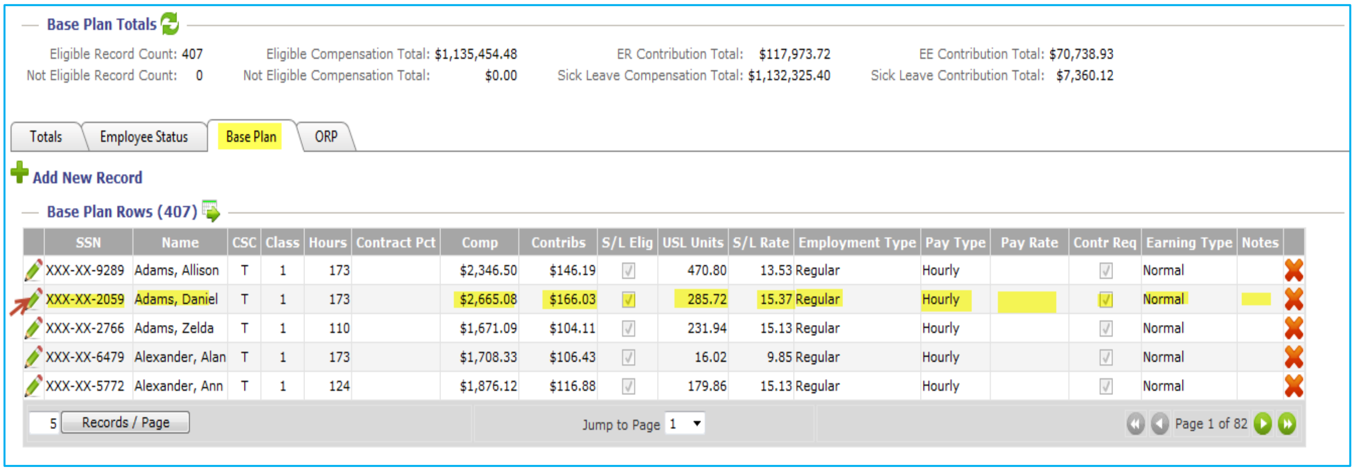


	Old Compensation	New Compensation	Old EE Contribution	New EE Contribution	EE Contribution Difference	Old ER Contribution	New ER Contribution	ER Contribution Difference
Class 1	$806,385.66	$806,385.66	$50,237.94	$50,237.94	**$0.00**	$83,783.53	$83,783.53	**$0.00**
Class 3	$329,068.82	$329,068.82	$20,500.99	$20,500.99	**$0.00**	$34,190.25	$34,190.25	**$0.00**
Sick Leave	$1,132,325.40	$1,132,325.40				$7,360.12	$7,360.12	**$0.00**
Totals:	**$2,267,779.88**	**$2,267,779.88**	**$70,738.93**	**$70,738.93**	**$0.00**	**$125,333.90**	**$125,333.90**	**$0.00**

Click the tabs (e.g., *Base Plan*) to view the relevant data.

Step 4: Perform the necessary changes.

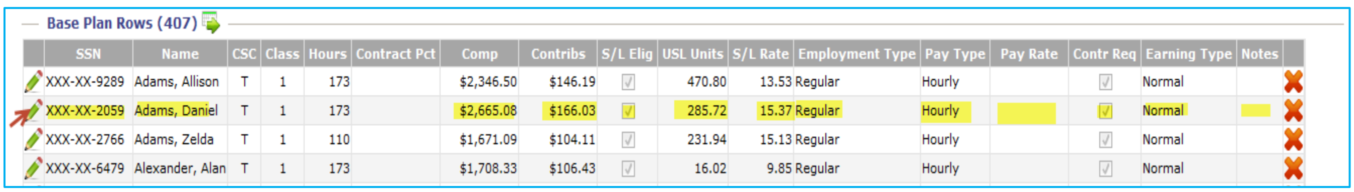
Use the tabs on the *Correct Pay Cycle (Open Report)* page to locate the data entries you need to change.



To edit an entry, perform the following:

1. Click the **Edit** icon to make the row editable.

   Note: All fields are editable except *SSN, Name, and CSC*.

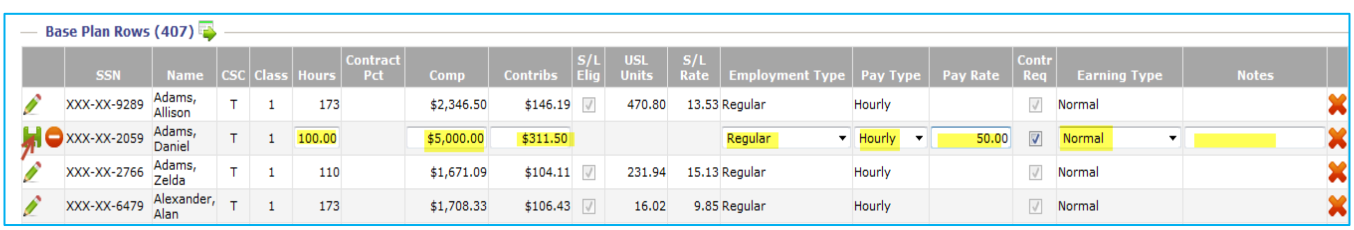


2. Perform the necessary corrections.

   Note: To correct the data, enter the amount that should have been submitted, not the difference between the original submission and the new amount.

3. Choose one of the following options:

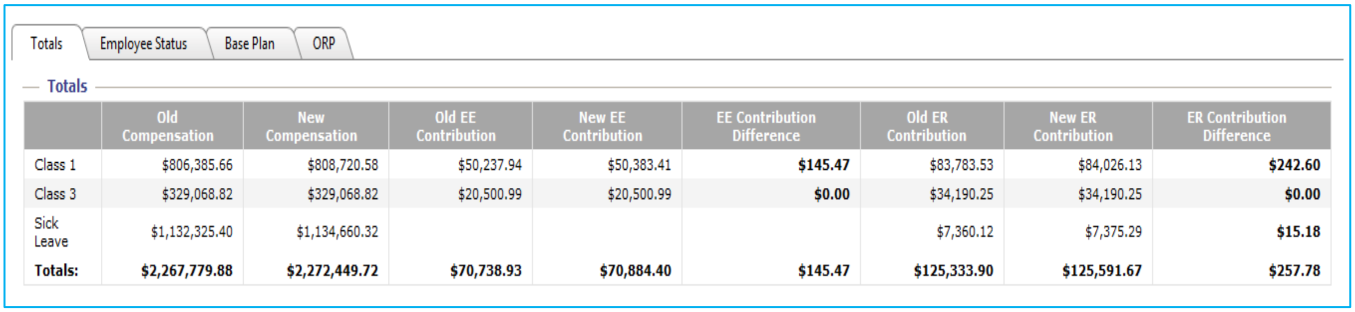
   - Click the **Save** icon to save the edited information and return the row to a non-editable state.
   - Click the **Cancel** icon to revert to the original data (undo your changes) and return the row back to a non-editable state.



Step 5: Submit your corrections.

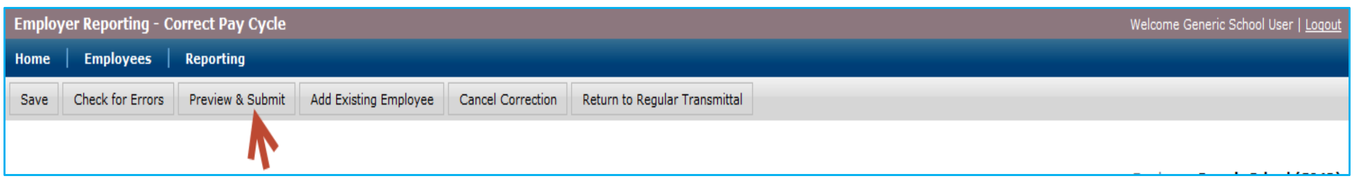
As you make your changes, the *Totals* tab shows the differences in compensation, EE contributions, and ER contributions.

- The *Old* columns show totals from the last revision of the transmittal period.
- The *New* columns show data from the current report.
- The *Difference* columns are calculated as *New* minus *Old*.



	Old Compensation	New Compensation	Old EE Contribution	New EE Contribution	EE Contribution Difference	Old ER Contribution	New ER Contribution	ER Contribution Difference
Class 1	$806,385.66	$808,720.58	$50,237.94	$50,383.41	**$145.47**	$83,783.53	$84,026.13	**$242.60**
Class 3	$329,068.82	$329,068.82	$20,500.99	$20,500.99	**$0.00**	$34,190.25	$34,190.25	**$0.00**
Sick Leave	$1,132,325.40	$1,134,660.32				$7,360.12	$7,375.29	**$15.18**
Totals:	**$2,267,779.88**	**$2,272,449.72**	**$70,738.93**	**$70,884.40**	**$145.47**	**$125,333.90**	**$125,591.67**	**$257.78**

After all of your corrections have been entered, click **Preview & Submit** in the action menu.



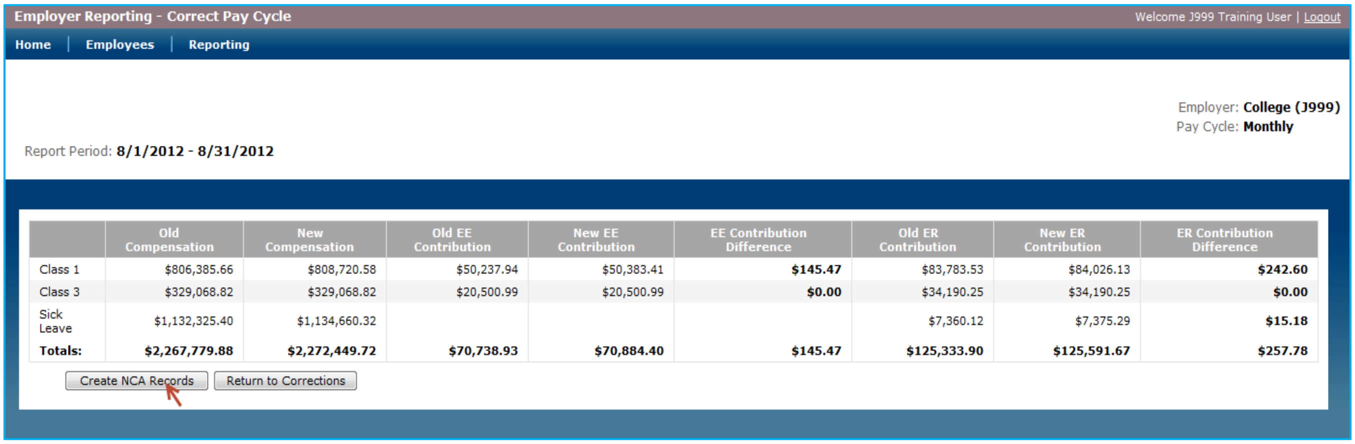
- ➢ The report is saved and then checked for errors.
- ➢ If no errors or warnings are found, the *Bill Summary* page displays.

The *Bill Summary* page displays a grid with the final differences in compensation and contributions.

Step 6: Submit your changes to the NCA records.

If all compensation and contributions look correct, click **Create NCA Records**.

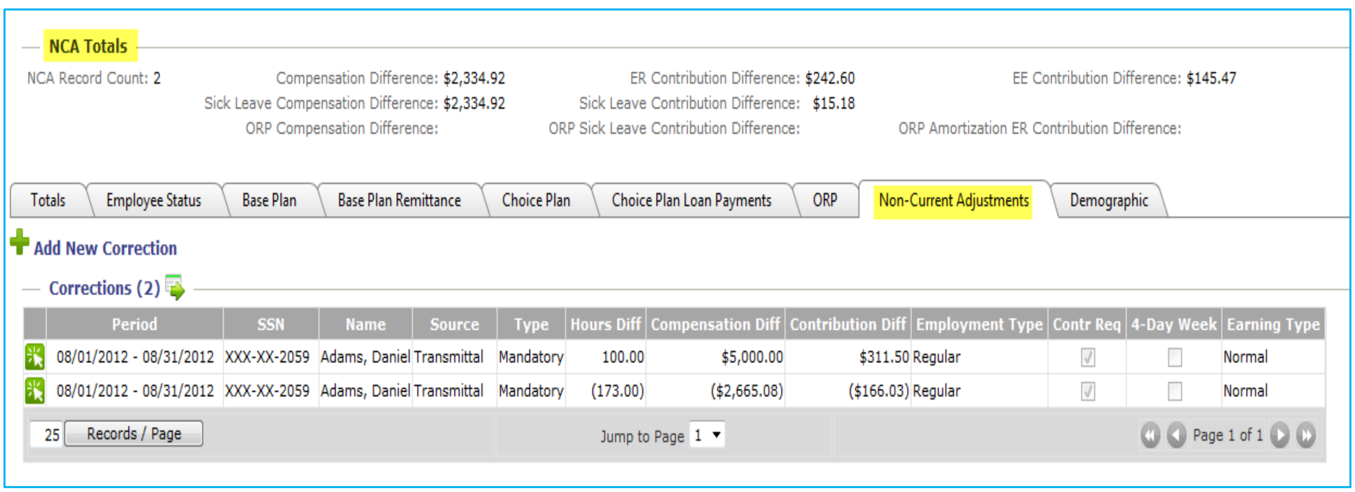
➢ The transmittal status changes to "Pending" and the *Non-Current Adjustments* tab in the regular transmittal displays the corrected rows for all of the corrected reports in pending status.



	Old Compensation	New Compensation	Old EE Contribution	New EE Contribution	EE Contribution Difference	Old ER Contribution	New ER Contribution	ER Contribution Difference
Class 1	$806,385.66	$808,720.58	$50,237.94	$50,383.41	**$145.47**	$83,783.53	$84,026.13	**$242.60**
Class 3	$329,068.82	$329,068.82	$20,500.99	$20,500.99	**$0.00**	$34,190.25	$34,190.25	**$0.00**
Sick Leave	$1,132,325.40	$1,134,660.32				$7,360.12	$7,375.29	**$15.18**
Totals:	**$2,267,779.88**	**$2,272,449.72**	**$70,738.93**	**$70,884.40**	**$145.47**	**$125,333.90**	**$125,591.67**	**$257.78**

If the compensation and contributions are not correct, click **Return to Corrections.**

➢ The report returns to the *Correct Pay Cycle (Open Report)* page to allow additional corrections.



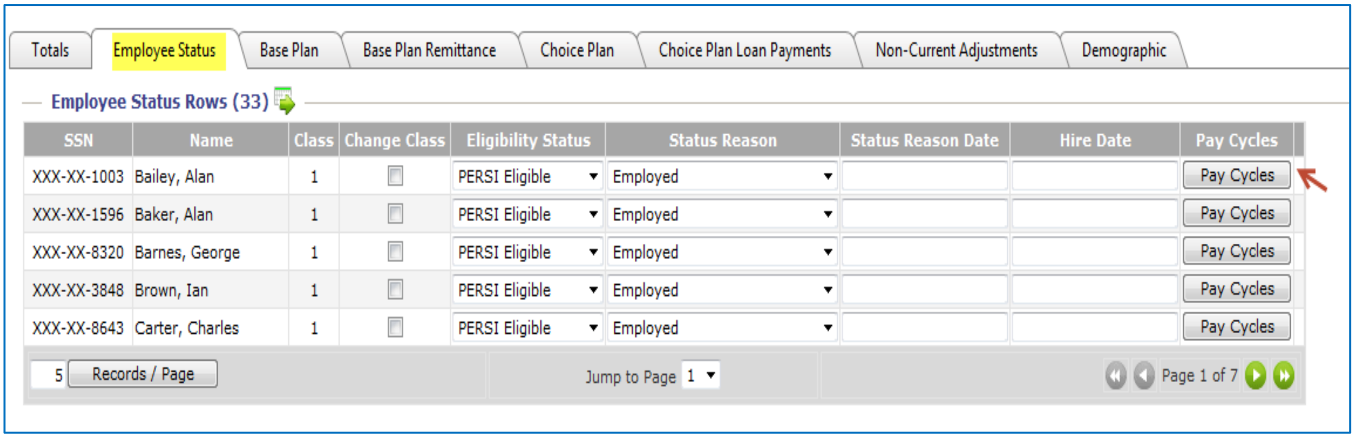
	Period	SSN	Name	Source	Type	Hours Diff	Compensation Diff	Contribution Diff	Employment Type	Contr Req	4-Day Week	Earning Type
	08/01/2012 - 08/31/2012	XXX-XX-2059	Adams, Daniel	Transmittal	Mandatory	100.00	$5,000.00	$311.50	Regular	☑	☐	Normal
	08/01/2012 - 08/31/2012	XXX-XX-2059	Adams, Daniel	Transmittal	Mandatory	(173.00)	($2,665.08)	($166.03)	Regular	☑	☐	Normal

Editing Pay Cycles

The *Pay Cycles* page is used to designate which pay cycles an employee belongs to and ensure that the employee is assigned to at least one pay cycle at any given time.

To open the *Pay Cycles* page for a given employee, perform the following:

1. Select the **Employee Status** tab during a regular transmittal.
2. Locate the employee's row.
3. Click **Pay Cycles** in that row.



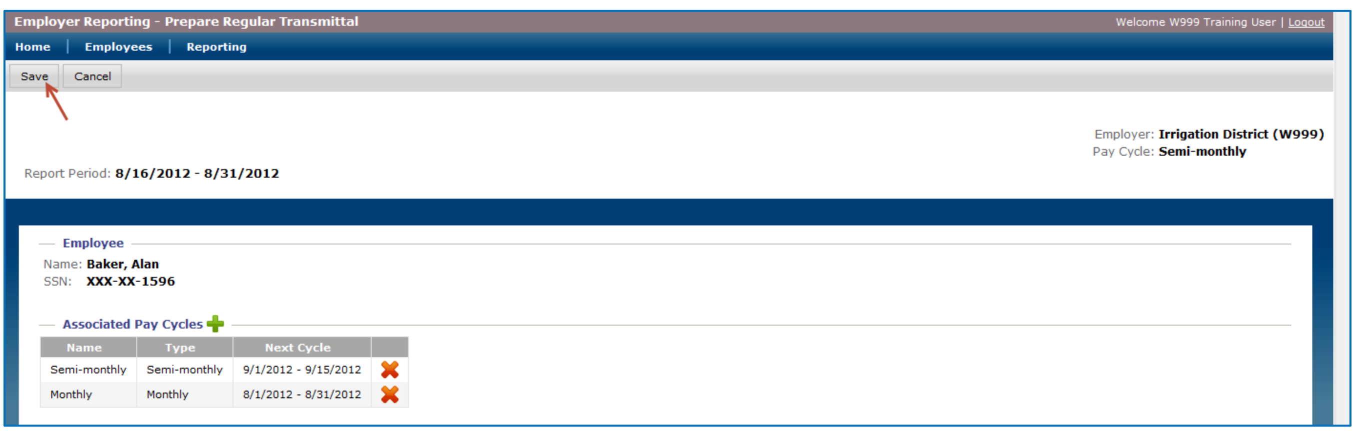
➢ The *Pay Cycles* page displays.

To edit the pay cycle entries for the employee, perform the following:

- Click the **Add** icon for **Associated Pay Cycles** to add the employee to a pay cycle.
- Click the **Delete** icon to remove the employee from a given pay cycle.

Note: There must always be at least one row for an employee.

After the employee's pay cycle has been edited, click **Save** in the top-left corner.

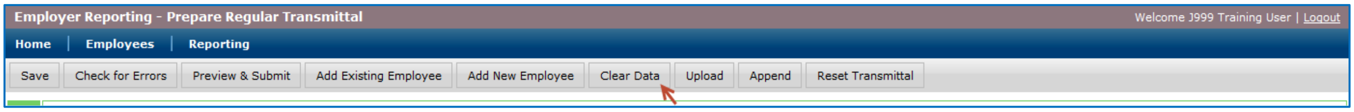


Clearing Data

The *Clear Data* function is used to clear all wage and contribution information from the open transmittal.

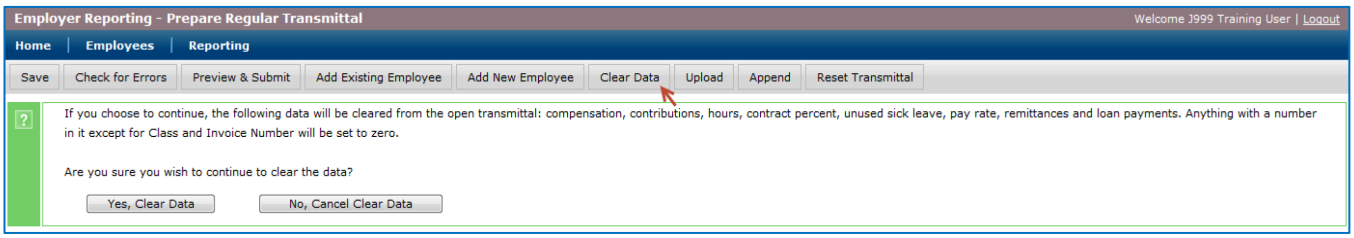
To clear the open transmittal, perform the following:

1. Click **Clear Data** in the action menu.



   ➢ A confirmation message asks "Are you sure you wish to continue to clear the data?"

2. Click **Yes, Clear Data** to confirm or **No, Cancel Clear Data** to cancel.



   ➢ If the clear is confirmed, all compensation, DB and DC contribution, hour, contract percentage, unused sick leave time, pay rate, remittance, and loan payment fields in the current cycle are cleared.

   Note: Any field with a number in it, except for the *Class* and *Invoice Number* fields, is set to zero.

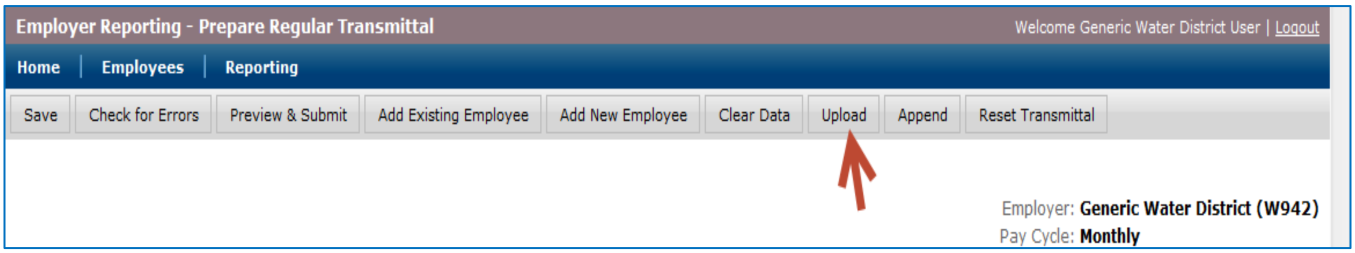
Upload (Upload Employer Only)

The *Upload* function is used to restart a transmittal from the upload forward. If you discover during a transmittal that you need to restart with your original upload data, you can use this function to clear out your current data and re-upload your file.

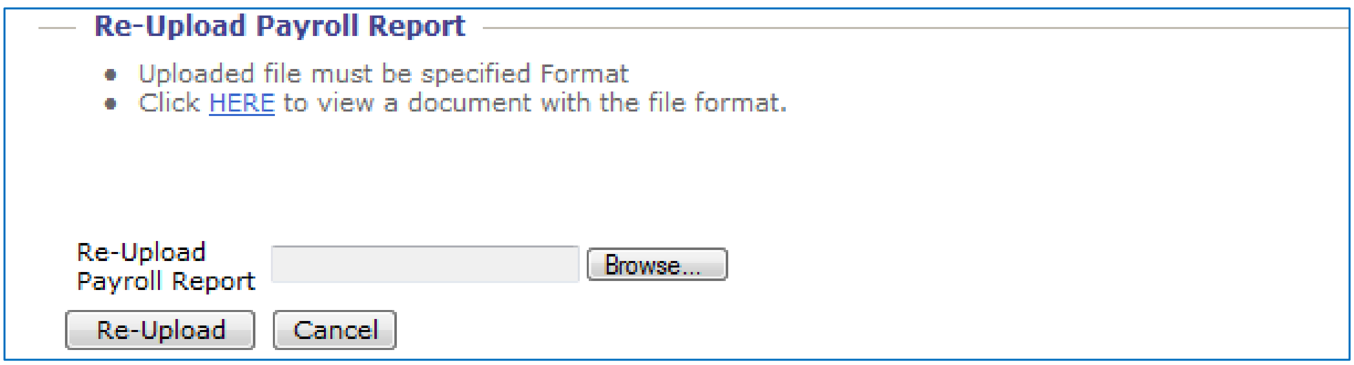
Caution: This process should be used judiciously, since your previously-uploaded transmittal information will be lost.

To re-upload your data, perform the following:

1. Click **Upload** in the action menu.



   ➢ The *Re-Upload Payroll Report* screen displays.



2. Click **Browse**.

   ➢ A pop-up window displays.

3. Navigate to your payroll file.
4. Click the file to select it.
5. Click **Open**.

   ➢ The pop-up window closes.

6. Click **Re-Upload**.

   ➢ The previously-uploaded data is cleared and replaced with the data from the selected file.

Note: To stop the upload, click **Cancel** at any point prior to clicking **Re-Upload**.

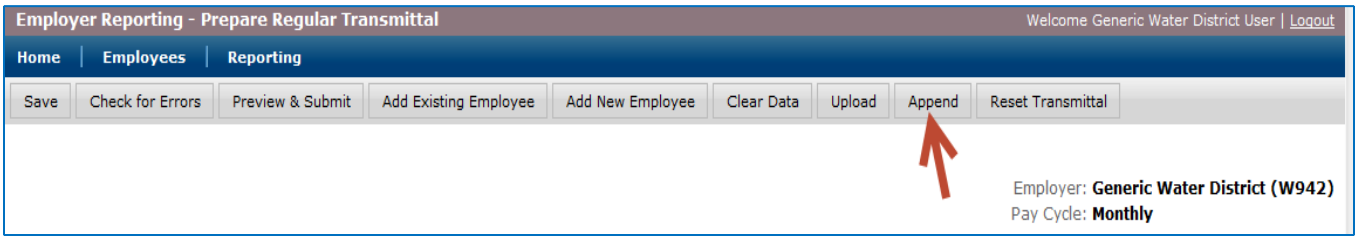
Append (Upload Employer Only)

The *Append* function is used to add additional detail records to an open transmittal that has yet to be submitted to PERSI.

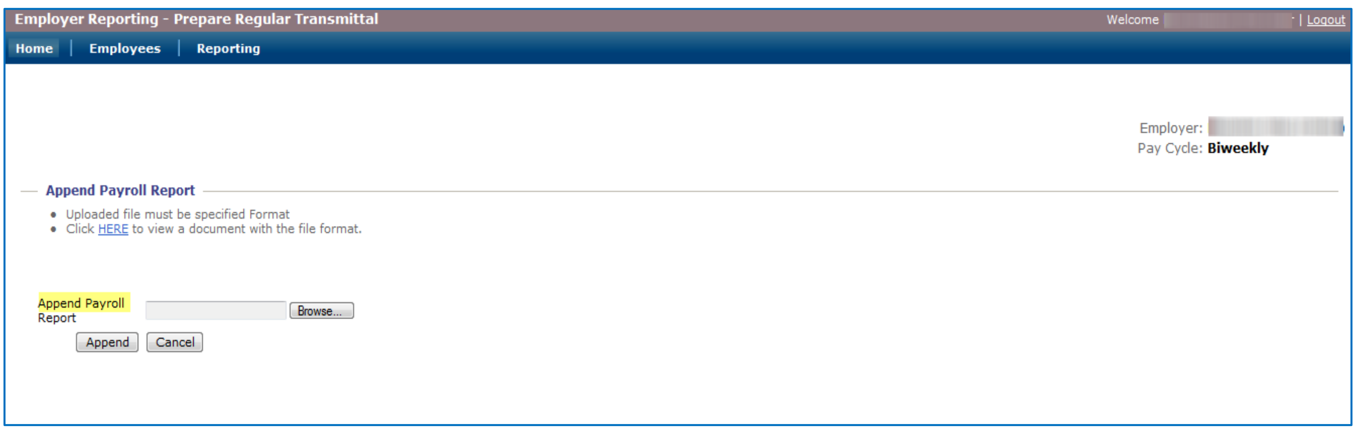
Caution: This process should be used judiciously, since your previously-uploaded transmittal file detail records will be comingled with the appended file detail record. The new total amounts are also updated.

To append data to your transmittal, perform the following:

1. Click **Append** in the action menu.



   ➢ The *Append Payroll Report* screen displays.



2. Click **Browse**.

   ➢ A pop-up window displays.

3. Navigate to your payroll file.
4. Click the file to select it.
5. Click **Open**.

   ➢ The pop-up window closes.

6. Click **Append**.

   ➢ The additional data is added into the open transmittal.

   Note: To stop the appending process, click **Cancel** at any point prior to clicking **Append**.

Glossary

Definitions

Contribution Source Code (CSC)

Designates where a listed contribution comes from. Contribution source codes are defined as follows:

- **R**: Remittance (payment against an employee invoice or employee loan)
- **T**: Transmittal (all other contributions deducted from an employee's pay)
- **E**: Employer (DC plan contributions paid for by an employer)
- **P**: PERSI retired (contributions for a Working Retired Member)
- **A**: All (non-PERSI eligible employees)
- **O**: ORP (contributions for an employee who belongs to an Optional Retirement Plan)

DB Plan

A "defined benefit" plan. The PERSI Base Plan is a DB plan in a 401(a) trust that provides a well-defined retirement benefit based on years of service, average salary, and a multiplier. The benefit is guaranteed to be payable for the member's lifetime, and for the lifetime of the member's survivor should the member choose such an option.

DC Plan

A "defined contribution" plan. The PERSI Choice Plan is a DC plan in a 401(k) account that provides a termination benefit dependent on employee and employer contributions, gain sharing accumulations, and the account's investment earnings.

Employee Contributions

Money you pay into the retirement system that is credited to your account. Employee contributions to the Base Plan are mandatory, while contributions to the Choice 401(k) Plan are voluntary.

Employee Member

An employee who is an active member of PERSI.

Employer

An employer belonging to the PERSI retirement system.

Arrivos

The software platform that supports PERSI's pension administration system.

ORP

An “optional retirement plan.” In this case, a DC plan used by the teaching staff and officers at Idaho’s colleges and universities.

Pay Cycle

The interval at which an employer regularly pays employees (weekly, bi-weekly, monthly, semi-monthly, etc.).

Remittance

A payment due to PERSI. This payment is generally composed of contributions and submitted via check, electronic funds transfer (EFT), or another method.

Supplemental Transmittal

A transmittal containing additional items that do not fall into the standard payroll cycle, such as bonuses. The start date may be any day of the month. The end date must be the same as the start date. This is also referred to as off-cycle reporting.

Transmittal Report

A record of all contributions required from an employer and its employees for a given pay period combined with contribution adjustments correcting previous errors or omissions, employee payments on an account (remittances), and other indicative information. This file is uploaded into the Arrivos employer reporting system by an Arrivos user.

WRM (Working Retired Member)

An employee who is retired from PERSI and meets the criteria below; employer contributions are required, but employee contributions are not:

a) A certificated teacher or certificated administrator.
b) Age sixty-two years or older on the date of retirement.
c) Receiving an un-reduced retirement benefit. (Met the Rule of 90 or reached service retirement age at time of retirement.)
d) Has never received benefits under the early retirement program established by section 33-1004G, Idaho Code.
e) Was employed as a school teacher or administrator at time of retirement.
f) Re-hired at a school district (K through 12).
g) Rehired on or after July 1, 2007.
h) No active employments on the employee’s PERSI account

Those meeting the above requirements may return to work at a school as a teacher or administrator without a break in service.

Mouse-Over Text

The following clarifications are also available as tool-tips; simply hold your mouse cursor over these terms in Arrivos to see the expanded term:

CSC—Contribution Source Code

Comp—Compensation

S/L Elig—Eligible for Sick Leave

USL Units—Unused Sick Leave Units

4-Day Week—Is the employee working a four day week at a school district?

Appendices

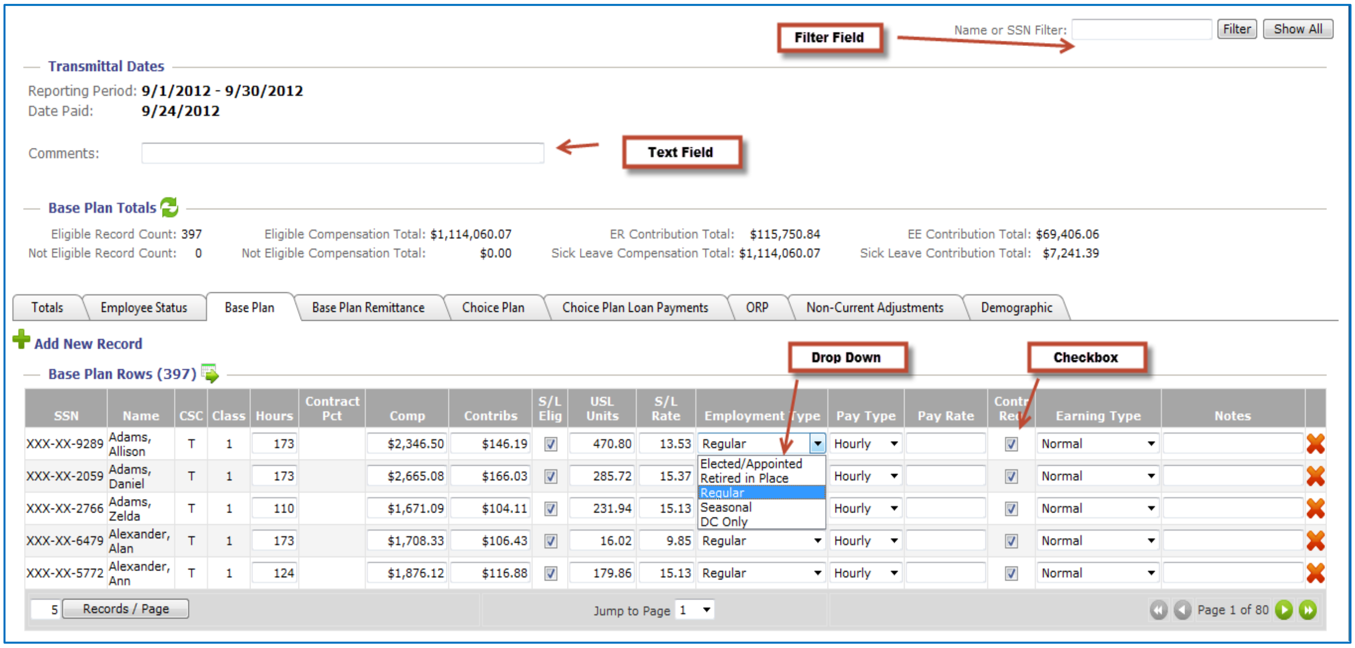
Appendix A: Arrivos Icon Descriptions

Arrivos displays the following icons to indicate when certain actions may be performed. Click the icon to perform the associated action.

Icon	Icon Name	Action
	**Select**	Selects an item for viewing or to provide further information.
	**Add**	Adds an item.
	**Edit**	Edits an item.
	**Delete**	Deletes an item.
	**Export Data**	Exports data from the grid into a CSV file. **Note:** This file allows users to view sort, and filter the data in Excel.
	**Refresh**	Refreshes information in a control from the database.
	**Reset Changes**	Resets data to what it was before it was edited.
	**Save**	Saves data that has been edited.
	**Cancel**	Cancels in-row editing.

Appendix B: Arrivos Common Features

Arrivos uses certain common features on each screen. Understanding these features can help you navigate through Arrivos and find specific information quickly and accurately.



Filter Field

Use a filter field to quickly find specific employees. For example, use the *Name or SSN Filter* field to find a specific user by his or her employee name or Social Security Number (SSN).

To use a filter field, perform the following:

1. Click to select the field, type the appropriate data into the field, and then click **Filter**.

   ➢ All other data will be hidden to allow you to view entries that contain the specified data.

2. Click **Show All** to remove the filter.

Calendar Control Menu

Use a calendar control menu to view data for specific dates from the current, next, or previous month.

To use a calendar control menu, perform the following:

1. Click the **Down Arrow** on the menu field.
2. Select the appropriate date from those displayed.

Checkbox

Use a checkbox to select or deselect a specific option or list item. For example, the checkboxes in the *Contr Req* column are selected when employees are required to make contributions.

To use a checkbox, perform the following:

- Click to select or deselect the checkbox.
  - The selected checkbox display a checkmark. A deselected checkbox does not.

A stand-alone checkbox is used to activate or deactivate a single option.

A list of checkboxes allows users to select any number of items on a list, including zero items or all of them. Each checkbox in a list is independent of the others, so selecting one checkbox will not deselect the others.

Text Field

Use a text field to input text. For example, use the *Comments* and *Notes* fields to add detail to a particular record or set of records.

To use a text field, perform the following:

1. Click to select the text box.
2. Type your text in the field.

Drop-Down Menu

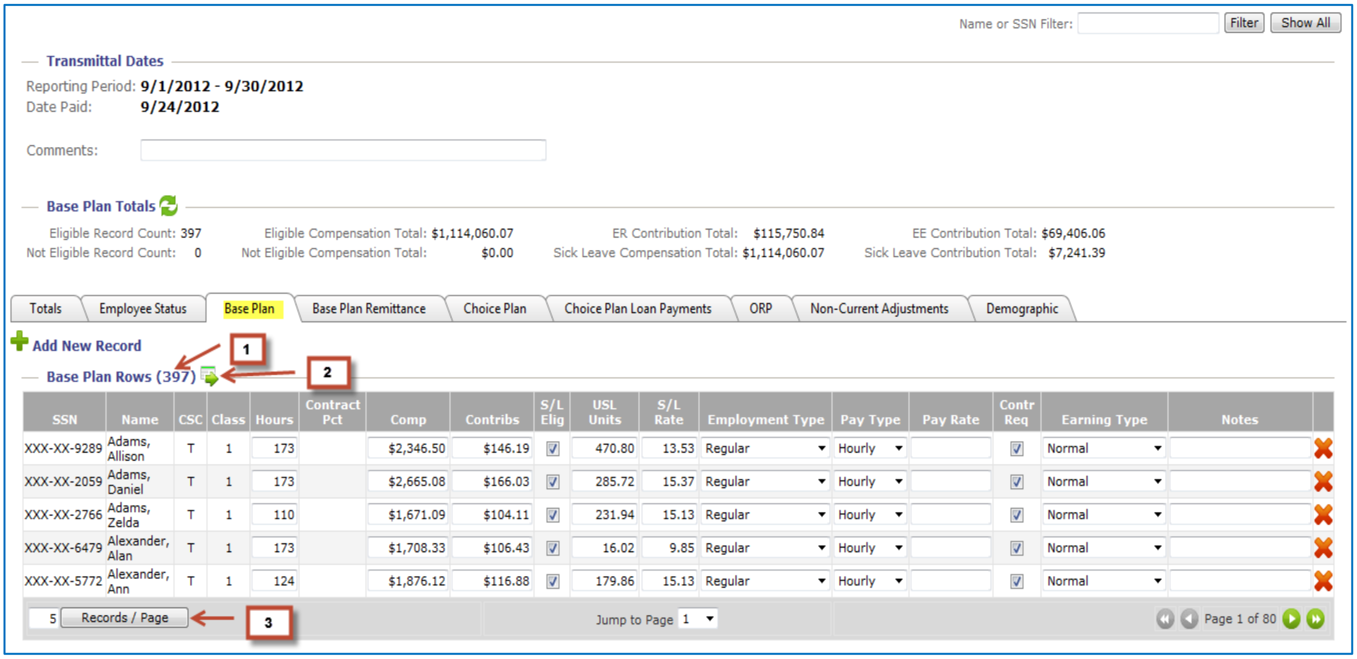
Use a drop-down menu to select an option from a series of appropriate responses. For example, use the *Employment Type* field to select an employment type from a series of predefined options.

To use a drop-down menu, perform the following:

1. Click the **Down Arrow** on the field.
2. Click one of the displayed options to select it.

Appendix C: Arrivos Common Functions

Arrivos employs certain common functions to help users view and navigate data. Understanding these functions can help you find and use your data more efficiently.



Grid Header (1)

At the top of each grid, Arrivos displays the grid title and the total number of rows in the grid. For example, *Base Plan Rows (43)*.

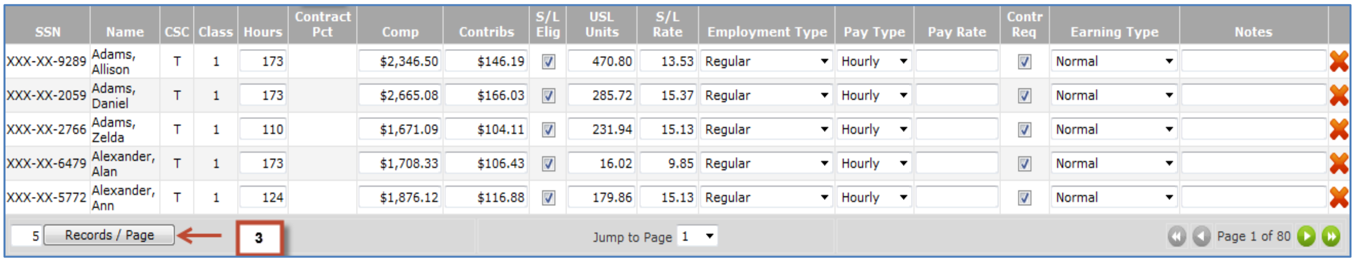
Export Data Icon (2)

Arrivos displays an **Export Data** icon next to the row header. 

Click this icon to export the data on the grid into a CSV file for use in Microsoft Excel (see Exporting Data to a CSV File, below).

Navigation Bar (3)

Arrivos displays the navigation bar at the bottom of each page. You can use the controls on this bar to move through the pages in a grid and control how many records you see on each page.



SSN	Name	CSC	Class	Hours	Contract Pct	Comp	Contribs	S/L Elig	USL Units	S/L Rate	Employment Type	Pay Type	Pay Rate	Contr Req	Earning Type	Notes
XXX-XX-9289	Adams, Allison	T	1	173		$2,346.50	$146.19		470.80	13.53	Regular	Hourly			Normal	
XXX-XX-2059	Adams, Daniel	T	1	173		$2,665.08	$166.03		285.72	15.37	Regular	Hourly			Normal	
XXX-XX-2766	Adams, Zelda	T	1	110		$1,671.09	$104.11		231.94	15.13	Regular	Hourly			Normal	
XXX-XX-6479	Alexander, Alan	T	1	173		$1,708.33	$106.43		16.02	9.85	Regular	Hourly			Normal	
XXX-XX-5772	Alexander, Ann	T	1	124		$1,876.12	$116.88		179.86	15.13	Regular	Hourly			Normal	

The navigation bar contains three different functions:

Records Per Page

Arrivos displays the number of records per page on the left part of the navigation bar. Arrivos defaults to 50 records per page, but you can set the display to show more or fewer records per page.

To set the number of records per page, perform the following:

1. Click the field next to the **Records / Page** button.
2. Type the number of records you want to display on each page.
3. Click **Records / Page** to confirm.

Jump to Page

Arrivos displays a Jump to Page menu in the middle of the navigation bar. Use this menu to move directly to a page.

To jump to a specific page, perform the following:

1. Click the **Down Arrow** in the **Jump to Page** menu.
2. Select the desired page from the drop-down list.

Page Navigation

Arrivos displays page navigation buttons on the right side of the navigation bar. Use these buttons to move through the grid.

To use the page navigation buttons, perform the following:

1. Click the **Single Arrows** to move forward or backward through the grid one page at a time.
2. Click the **Double Arrows** to move to the end or beginning pages of the grid.

Appendix D: Exporting Data to a CSV File

Arrivos displays an **Export Data** icon next to the row header. You can use this icon to export the data on the grid into a CSV file for use in Microsoft Excel.

To export the data on a grid, perform the following:

1. Click the **Export Data** icon.

   ➢ The CSV file displays.

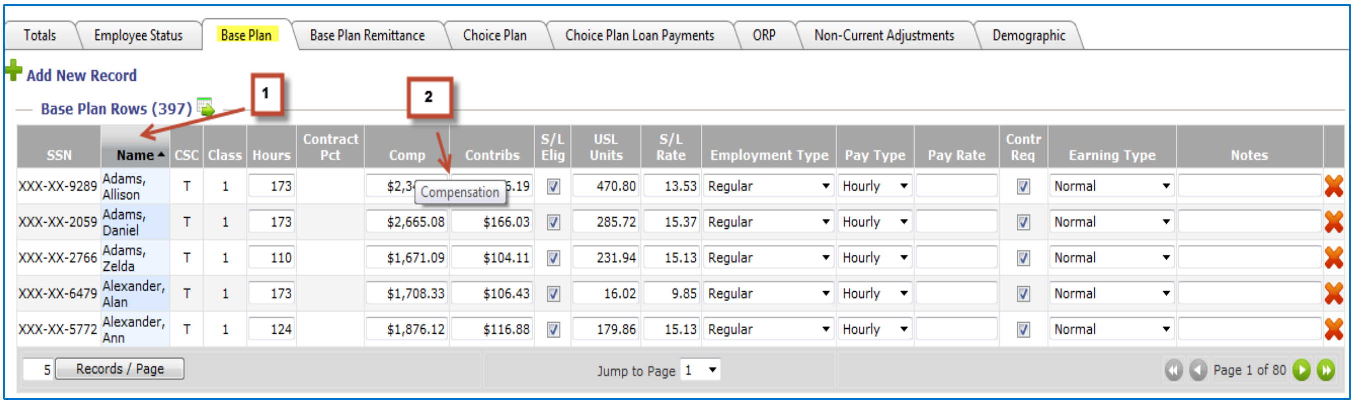
SSN	Name	CSC	Class	Hours	Contract Pct	Comp	Contribs	S/L Elig	USL Units	S/L Rate	Employment Type	Pay Type	Pay Rate	Contr Req	Earning Type	Notes
XXX-XX-9289	Adams, Allison	T	1	173	0%	$2,346.50	$146.19	TRUE	470.8	13.53	Regular	Hourly		TRUE	Normal	
XXX-XX-2059	Adams, Daniel	T	1	173	0%	$2,665.08	$166.03	TRUE	285.72	15.37	Regular	Hourly		TRUE	Normal	
XXX-XX-2766	Adams, Zelda	T	1	110	0%	$1,671.09	$104.11	TRUE	231.94	15.13	Regular	Hourly		TRUE	Normal	
XXX-XX-6479	Alexander, Alan	T	1	173	0%	$1,708.33	$106.43	TRUE	16.02	9.85	Regular	Hourly		TRUE	Normal	
XXX-XX-5772	Alexander, Ann	T	1	124	0%	$1,876.12	$116.88	TRUE	179.86	15.13	Regular	Hourly		TRUE	Normal	
XXX-XX-5145	Alexander, Katherine	T	1	170	0%	$3,249.49	$202.44	TRUE	123.94	19.03	Regular	Hourly		TRUE	Normal	
XXX-XX-6460	Alexander, Linda	T	1	162	0%	$1,733.00	$107.97	TRUE	260.33	10.66	Regular	Hourly		TRUE	Normal	
XXX-XX-9641	Allen, Ilana	T	1	173	0%	$3,329.83	$207.45	TRUE	19.1	19.21	Regular	Hourly		TRUE	Normal	
XXX-XX-5505	Allen, Monique	T	1	104	0%	$1,226.54	$76.41	TRUE	4.52	11.69	Regular	Hourly		TRUE	Normal	
XXX-XX-5229	Allen, Quincy	T	3	0	0%	$5,052.75	$314.79	TRUE	1718.03	44.58	Regular	Salaried		TRUE	Normal	
XXX-XX-1984	Allen, Tabetha	T	1	173	0%	$2,931.42	$182.63	TRUE	522.99	16.91	Regular	Hourly		TRUE	Normal	
XXX-XX-6042	Anderson, Eileen	T	1	173	0%	$3,107.83	$193.62	TRUE	776.47	17.92	Regular	Hourly		TRUE	Normal	
XXX-XX-6523	Anderson, Frances	T	1	173	0%	$3,045.00	$189.70	TRUE	195	17.56	Regular	Hourly		TRUE	Normal	
XXX-XX-2056	Anderson, Jennifer	T	1	173	0%	$4,416.66	$275.16	TRUE	300.83	25.48	Regular	Hourly		TRUE	Normal	

2. Manipulate (sort/filter) the data in Excel.

   Note: Please refer to your Microsoft Excel help file for more information on sorting and filtering data.

Appendix E: Sorting and Tool Tips

In addition to the common functions above, Arrivos provides sorting and tool tip functions for each grid displayed. Use these functions to sort data by columns and ensure you are viewing the correct column in longer record sets.



Sorting Arrows (1)

Use the sorting arrows to sort the grid by a given column in ascending or descending order.

To sort a column, perform the following:

1. Click the **Arrow** next to the column header to sort the grid by the data in that column. For example, to sort the *Name* column in alphabetical order.
2. Click the **Arrow** again to sort the data in the opposite order. For example, to sort the *Name* column in reverse-alphabetical order.

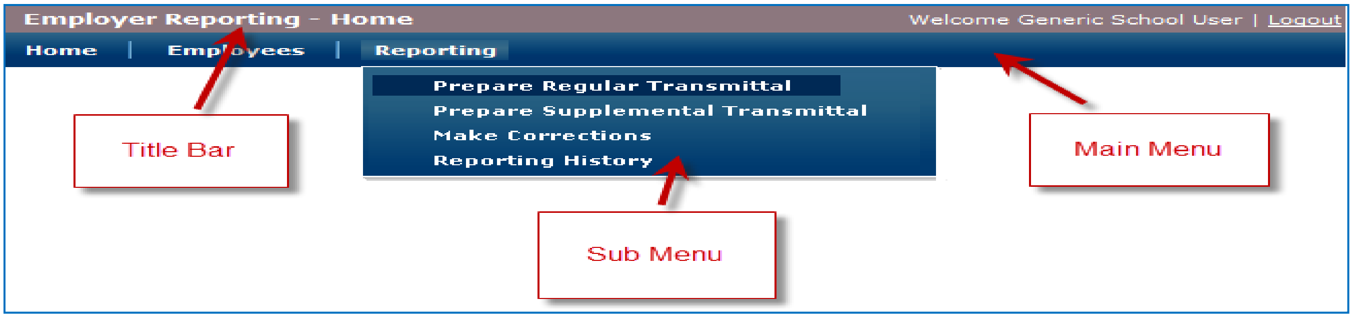
Column Tool Tips (2)

For grids with a large number or records displayed, use tool tips to ensure you are using the data from the appropriate column.

To use a tool tip, simply hold your mouse pointer over the data until a tool tip displays the column name.

Appendix F: Using the Title Bar, Main Menu, and Sub-Menus

Arrivos displays a number of navigations aids at the top of each screen. You can use these items to identify your location in Arrivos, navigate to various pages throughout the system, and access important business functions.



The Title Bar

The grey title bar at the top of the page displays the following information about your location and login status on each page:

- **Application Name**: On the left side, prior to the dash, Arrivos displays the name of the currently-active application. For example, *Employer Reporting*.
- **Current Page**: On the left side, after the dash, Arrivos displays the name of the current page. For example, *Home*.
- **User Name**: On the right side, between "Welcome" and vertical spacer (|), Arrivos displays the name of the currently logged-in operator. This name is determined for each operator when he or she creates his or her Employer Reporting account. For example, *Generic School User*.
- **Logout Link**: On the right side, after the vertical spacer, Arrivos displays a logout link. Click the link to log out of Arrivos.

The Main Menu

The dark-blue main menu bar is located just under the title bar. It contains links to various pages, including the Arrivos Home page, the Employee Search page, and the Arrivos reporting pages (in a sub-menu). Click the links to activate them.

- **Home:** Displays the Arrivos Home page.
- **Employees:** Displays the Employee Search page.
- **Reporting**: Click **Reporting** to display a drop-down list (a sub-menu) with a series of business functions grouped together. These items are called sub-menu items. Click a sub-menu item to open the corresponding page.

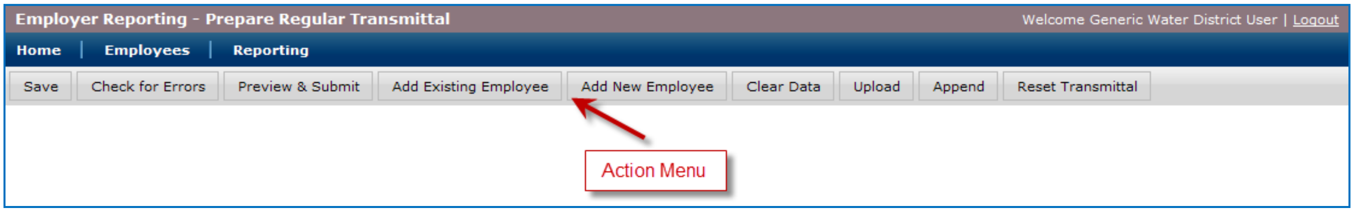
Sub-Menu Items

The following sub-menus are accessed by clicking the appropriate link under the *Reporting* menu:

- **Prepare Regular Transmittal**: Displays employer reporting data for a payroll to be submitted or uploaded to PERSI.
- **Prepare Supplemental Transmittal**: Displays a transmittal page for a one-time transmittal aimed at a single date instead of a date range. A bonus payroll is one example of a supplemental transmittal.
- **Make Corrections**: Displays a page for correcting previously-submitted transmittals.
- **Reporting History**: Displays reports associated with past transmittals.

Appendix G: The Action Menu

The action menu is located at the top of the screen beneath the main menu. It contains a series of buttons that perform various business functions.



The action menu provides the following options for roll-forward and upload employers:

- **Save**: Click to save the changes you make on the transmittal grid.
- **Check for Errors**: Click to save and validate the records in your transmittal.
  - ➢ If there are any errors, they display on the screen. The error messages indicate the type of error as well as the detailed record or records associated with that error.
- **Preview & Submit**: Click to save your data, check for errors, and display the transmittal summary page if there are no errors.
- **Add Existing Employee**: Click to search for an employee who is not in the current open transmittal, but who has been on transmittals in the past, and then add them as a new row on the grid and tab you are currently viewing.
- **Add New Employee**: Click to add an entirely new employee to the transmittal. This function is used when hiring a new employee.
- **Clear Data**: Click to clear the data from all fields in the open transmittal; including compensation, DB and DC contributions, hours, contract percent, unused sick leave, pay rate, remittances, and loan payments.
- **Reset Transmittal**: Click to delete the open transmittal and start a new transmittal.

  Caution: All data for this reporting cycle will be deleted. A confirmation dialogue box will be displayed.

The action menu also provides the following options for upload employers alone:

- **Upload**: Click to return to the upload screen and upload a new file to replace the current transmittal data.
- **Append**: Click to return to the upload screen, upload another file, and then append the new file data to the data in the currently-open transmittal.

Appendix H: Eligibility

An employee becomes a PERSI member when he or she is employed in an eligible position with a PERSI employer. By Idaho law, participation in PERSI's Base Plan is mandatory if the following requirements are met:

- The employer belongs to PERSI, and
- Employment is for 5 or more consecutive months, and
- The individual's normal work schedule is 20 hours or more per week, or
- The individual is a teacher who works half-time contract or more, or
- The individual is an elected or appointed official who is eligible based on statute.

Note: Seasonal or casual city, county, irrigation district, mosquito abatement district, or cemetery district employees whose employment depends on weather and growing seasons must have more than 8 months of service to be eligible.

An eligible employee no longer meets eligibility requirements if one of the following conditions occurs:

1. The employee moves to another (non-PERSI) employer, or
2. The employee's employer reports that he or she is working in a position that does not meet eligibility criteria, or
3. The employee works less than 20 hours a week during a consecutive 5-month period.

Arrivos notifies employers after recognizing that an employee has worked less than 20 hours per week and is still making contributions. If the employer has not changed the eligibility status for that employee at the end of 5 consecutive months where the employee did not meet eligibility requirements, the employer is required to change the employee's eligibility status.

Note: If the employee's hours increase to 20 or more per week, the employee must re-establish his or her eligibility.

Arrivos provides validations to determine eligibility based on the following criteria:

- For monthly transmittals:
  - If the employee does not have 240 hours accumulated over the first 5 pay cycles, the employer must change the employee's *Eligibility Status* in Arrivos to **Not PERSI Eligible**.
  - If the employer is sending in a file for upload, the record in the file must be changed to an A record.
- For semi-monthly transmittals:
  - If the employee does not have 240 hours accumulated over the first 10 pay cycles, the employer must change the employee's *Eligibility Status* in Arrivos to **Not PERSI Eligible**.
  - If the employer is sending in a file for upload, the record in the file must be changed to an A record.
- For weekly transmittals:
  - If the employee does not have 20 hours per pay cycle for 12 of the last 22 pay cycles, the employer must change the employee's *Eligibility Status* in Arrivos to **Not PERSI Eligible**.
  - If the employer is sending in a file for upload, the record in the file must be changed to an A record.
- For bi-weekly transmittals:
  - If the employee does not have 240 hours accumulated over the first 11 pay cycles, the employer must change the employee's *Eligibility Status* in Arrivos to **Not PERSI Eligible**.
  - If the employer is sending in a file for upload, the record in the file must be changed to an A record.
- For quad-weekly transmittals:
  - If the employee does not have 240 hours accumulated over the first 6 pay cycles, the employer must change the employee's *Eligibility Status* in Arrivos to **Not PERSI Eligible**.
  - If the employer is sending in a file for upload, the record in the file must be changed to an A record.

Eligibility Checks for Employees Reported as Not PERSI Eligible

When an employer reports someone as not PERSI eligible (A records: all non-PERSI records), Arrivos performs validations that look at the pay cycle type and other criteria for that record. If a problem is found, these validations display either a warning or an error telling the employer that the employee may be, or is, eligible based on the hours being reported. The minimum validation thresholds are listed below.

Note: For employees with contribution source code (*CSC*) **A** (all non-PERSI), *Employment Type* **R** (regular), and *Pay Type* **H** (hourly), the hours reported are higher than the minimum thresholds set for the pay cycle.

Arrivos Message: “Warning - This employee may be eligible for PERSI benefits. Please verify and update the Eligibility Status field if necessary.”

Pay Cycles

- Monthly: The employee has 80 hours per pay cycle for 3 out of the last 5 pay cycles. Arrivos checks the last 5 pay cycles; if 3 out of the last 5 pay cycles have 80 hours or more, Arrivos displays the warning message.
- Semi-Monthly: The employee has 40 or more hours per pay cycle for 6 out of the last 10 pay cycles. Arrivos checks the last 10 pay cycles; if 6 out of the last 10 pay cycles have 40 hours or more, Arrivos displays the warning message.
- Weekly: This warning message does not apply to weekly pay cycles.
- Bi-Weekly: The employee has 40 hours per pay cycle for 6 out of the last 11 pay cycles. Arrivos checks the last 11 pay cycles; if 6 out of the last 11 pay cycles have 40 hours or more, Arrivos displays the warning message.
- Quad-Weekly: The employee has 80 hours per pay cycle for 4 out of the last 6 pay cycles. Arrivos checks the last 6 pay cycles; if 4 out of the last 6 pay cycles have 80 hours or more, Arrivos displays the warning message.

Eligibility Checks for Employees Reported as Not PERSI Eligible (continued)

Arrivos Message: "Error - This employee is eligible for PERSI benefits. Please verify and update the Eligibility Status field accordingly."

Pay Cycles

- Monthly: The employee has 176 hours per pay cycle for 3 out of the last 5 pay cycles. Arrivos checks the last 5 pay cycles; if 3 out of the last 5 pay cycles have 176 hours or more, Arrivos displays the error message.
- Semi-Monthly: The employee has 88 or more hours per pay cycle for 6 out of the last 10 pay cycles. Arrivos checks the last 10 pay cycles; if 6 out of the last 10 pay cycles have 88 hours or more, Arrivos displays the error message.
- Weekly: The employee has 20 or more hours per pay cycle for 12 out of the last 22 pay cycles. Arrivos checks the last 22 pay cycles; if 12 out of the last 22 pay cycles have 20 hours or more, Arrivos displays the error message.
- Bi-Weekly: The employee has 80 hours per pay cycle for 6 out of the last 11 pay cycles. Arrivos checks the last 11 pay cycles; if 6 out of the last 11 pay cycles have 80 hours or more, Arrivos displays the error message.
- Quad-Weekly: The employee has 160 hours per pay cycle for 4 out of the last 6 pay cycles. Arrivos checks the last 6 pay cycles; if 4 out of the last 6 pay cycles have 160 hours or more, Arrivos displays the error message.

Eligibility Checks for New Employees Being Reported as PERSI Eligible

When an employer reports a PERSI-eligible (T: transmittal) record for a new employee, Arrivos performs validations that look at pay cycle type and other criteria for that record. If a problem is found, these validations display an error telling the employer that the employee is not eligible based on the hours being reported. The minimum validation thresholds are listed below.

Note: For employees with contribution source code (*CSC*) **T** (transmittal), *Employment Type* **R** (regular), and *Pay Type* **H** (hourly), the hours reported are lower than the minimum thresholds set for the pay cycle.

Arrivos Message: "Error - This person cannot be eligible based on the Hours reported. Change the Eligibility Status to 'Not PERSI Eligible.'"

Pay Cycle

- Monthly: The employee has less than 240 hours over the last 5 pay cycles. Arrivos adds up the hours from the last 5 pay cycles; if the sum is less than 240 hours, Arrivos displays the error message.
- Semi-Monthly: The employee has less than 240 hours over the last 10 pay cycles. Arrivos adds up the hours from the last 10 pay cycles; if the sum is less than 240 hours, Arrivos displays the error message.
- Weekly: The employee has less than 20 hours per pay cycle for 12 out of the last 22 pay cycles. Arrivos checks the last 22 pay cycles; if 12 out of the last 22 pay cycles have less than 20 hours, Arrivos displays the error message.
- Bi-Weekly: The employee has less than 240 hours over the last 11 pay cycles. Arrivos adds up the hours from the last 11 pay cycles; if the sum is less than 240 hours, Arrivos displays the error message.
- Quad-Weekly: The employee has less than 240 hours over the last 6 pay cycles. Arrivos adds up the hours from the last 6 pay cycles; if the sum is less than 240 hours, Arrivos displays the error message.

Eligibility Checks for Employees Being Reported as PERSI Eligible

When an employer reports a PERSI-eligible (T) record for an employee, Arrivos performs validations that look at pay cycle type and other criteria. If a problem is found, these validations display a warning or an error telling the employer that the employee is at risk of losing, or has lost, his or her eligibility based on the hours being reported. The minimum validation thresholds are listed below.

Note: For employees with contribution source code (*CSC*) **T** (transmittal), *Employment Type* **R** (regular), and *Pay Type* **H** (hourly), the hours reported are lower than the minimum thresholds set for the pay cycle.

Arrivos Message: "Warning - Based on the Hours reported the last X pay cycles, this member is on track to lose their PERSI eligibility."

Pay Cycle

- Monthly: The employee has less than 40 hours per pay cycle for the 3rd, 4th, and 5th pay cycles out of the last 3, 4, or 5. Arrivos checks the last 3, 4, and 5 pay cycles; if 3, 4, or 5 consecutive pay cycles with less than 40 hours per pay cycle are detected, Arrivos displays the warning message. In this instance, **X** in the message above is *3*, *4*, or *5*.
- Semi-Monthly: The employee has less than 20 hours per pay cycle for the 8th, 9th, and 10th pay cycles out of the last 8, 9, or 10. Arrivos checks the last 8, 9, and 10 pay cycles; if 8, 9, or 10 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the warning message. In this instance, **X** in the message above is *8*, *9*, or *10*.
- Weekly: The employee has less than 20 hours per pay cycle for the 19th, 20th, and 21st pay cycles out of the last 19, 20, or 21. Arrivos checks the last 19, 20, and 21 pay cycles; if 19, 20, or 21 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the warning message. In this instance, **X** in the message above is *19*, *20*, or *21*.
- Bi-Weekly: The employee has less than 20 hours per pay cycle for the 9th, 10th, and 11th pay cycles out of the last 9, 10, or 11. Arrivos checks the last 9, 10, and 11 pay cycles; if 9, 10, or 11 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the warning message. In this instance, **X** in the message above is *9*, *10*, or *11*.

Eligibility Checks for Those Being Reported as PERSI Eligible (continued)

- Quad-Weekly: The employee has less than 40 hours per pay cycle for the 3rd, 4th, and 5th pay cycles out of the last 3, 4, or 5. Arrivos checks the last 3, 4, and 5 pay cycles; if 3, 4, or 5 consecutive pay cycles with less than 40 hours per pay cycle are detected, Arrivos displays the warning message. In this instance, **X** in the message above is *3*, *4*, or *5*.

Arrivos Message: "Error - Based on the Hours reported the last X pay cycles, this member has lost their PERSI eligibility. Please change the Eligibility Status to 'Not PERSI Eligible' and stop withholding contributions."

- Monthly: The employee has less than 40 hours per cycle for the last 6 pay cycles. Arrivos checks the last 6 pay cycles; if 6 consecutive pay cycles with less than 40 hours per pay cycle are detected, Arrivos displays the error message. In this instance, **X** in the message above is *6*.
- Semi-Monthly: The employee has less than 20 hours per cycle for the last 11 pay cycles. Arrivos checks the last 11 pay cycles; if 11 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the error message. In this instance, **X** in the message above is *11*.
- Weekly: The employee has less than 20 hours per cycle for the last 22 pay cycles. Arrivos checks the last 22 pay cycles; if 22 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the error message. In this instance, **X** in the message above is *22*.
- Bi-Weekly: The employee has less than 20 hours per cycle for the last 12 pay cycles. Arrivos checks the last 12 pay cycles; if 12 consecutive pay cycles with less than 20 hours per pay cycle are detected, Arrivos displays the error message. In this instance, **X** in the message above is *12*.
- Quad-Weekly: The employee has less than 40 hours per cycle for the last 6 pay cycles. Arrivos checks the last 6 pay cycles; if 6 consecutive pay cycles with less than 40 hours per pay cycle are detected, Arrivos displays the error message. In this instance, **X** in the message above is *6*.

Eligibility Checks for Seasonal Workers

When an employer reports an A (all non-PERSI) record for a seasonal employee, Arrivos performs validations that look at the number of consecutive pay cycles for that employee. If a seasonal employee exceeds 8 consecutive months of employment, then the position is not seasonal. Thus, if a problem is found, these validations display an error telling the employer that the employee must be changed to an **R** (regular) *Employment Type* or be terminated.

Note: These checks are for employees with contribution source code (*CSC*) **A** (all non-PERSI) and *Employment Type* **S** (seasonal).

Note: Only cities, counties, water districts, cemetery districts, or mosquito abatement districts can have seasonal employees.

Arrivos Message: "Error - Seasonal employees cannot exceed 8 months of employment. Reclassify this person by changing Employment Type to Regular and Eligibility Status to 'PERSI Eligible' and collect contributions based on past work history, or terminate person from Seasonal job and report as a new employee in a new position."

Pay Cycle

- Monthly: If the employee is reported as seasonal for 9 consecutive pay cycles, Arrivos displays the error message.
- Semi-Monthly: If the employee is reported as seasonal for 17 consecutive pay cycles, Arrivos displays the error message.
- Weekly: If the employee is reported as seasonal for 35 consecutive pay cycles, Arrivos displays the error message.
- Bi-Weekly: If the employee is reported as seasonal for 18 consecutive pay cycles, Arrivos displays the error message.
- Quad-Weekly: If the employee is reported as seasonal for 9 consecutive pay cycles, Arrivos displays the error message.

Notes

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