

# Annual Reporting for Working After Retirement

Just like reporting member contributions for active employees, annual contribution reporting for “working after retirement” employees will be completed on the employer web portal. When logging on to the portal, remember to use **Plan ID 6** after entering your employer number on the login screen.

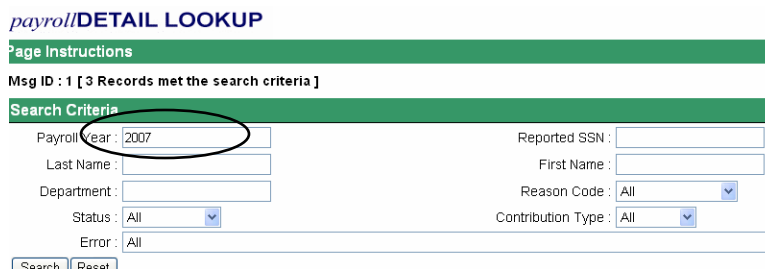
## Step 1: Navigate to Payroll Detail screen

After login, the portal will open to your Employer Profile screen. On the Site Menu, click **Payroll Detail**.



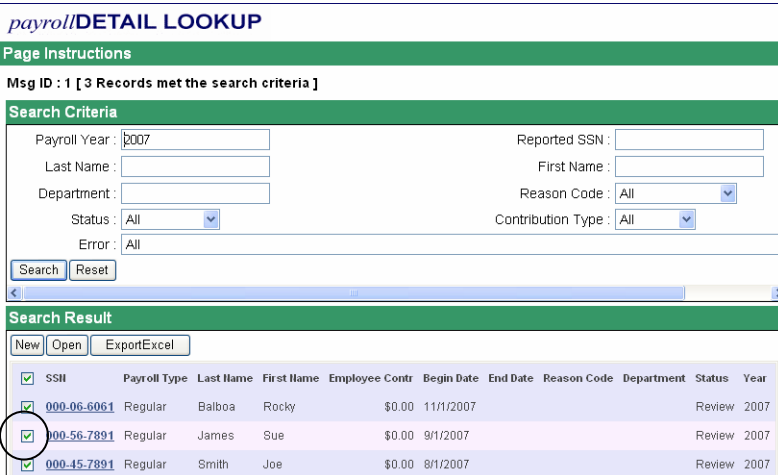
## Step 2: Lookup payroll information

In the field **Payroll Year** enter 2007 and then click the **Search** button. A list of employees will appear. You have previously submitted KPERs 1-R forms for these employees. Up to ten employees are listed on a page.



## Step 3: Open employee payroll records

Open records one at a time by clicking the **box** next to the employee's SSN. If you want to open all the employee records on the page, click the **box** next to the SSN column heading. Check marks will appear in all the SSN boxes on the page.



The screenshot shows a web application interface for payroll management. At the top, it says "payrollDETAIL LOOKUP". Below that is a green bar with "Page Instructions". A message box indicates "Msg ID : 1 [ 3 Records met the search criteria ]". The "Search Criteria" section contains several input fields: "Payroll Year" (2007), "Last Name", "Department", "Status" (All), "Reported SSN", "First Name", "Reason Code" (All), and "Contribution Type" (All). There are "Search" and "Reset" buttons. Below the search criteria is a "Search Result" section with "New", "Open", and "ExportExcel" buttons. A table displays search results with columns: SSN, Payroll Type, Last Name, First Name, Employee Contr, Begin Date, End Date, Reason Code, Department, Status, and Year. Three records are shown, each with a checked checkbox in the SSN column. An arrow points to the checkbox for SSN 000-56-7891.

| SSN   | Payroll Type | Last Name | First Name | Employee Contr | Begin Date | End Date | Reason Code | Department | Status | Year |
|---|--------------|-----------|------------|----------------|------------|----------|-------------|------------|--------|------|
| <input checked="" type="checkbox"/> 000-06-6061 | Regular      | Balboa    | Rocky      | \$0.00         | 11/1/2007  |          |             |            | Review | 2007 |
| <input checked="" type="checkbox"/> 000-56-7891 | Regular      | James     | Sue        | \$0.00         | 9/1/2007   |          |             |            | Review | 2007 |
| <input checked="" type="checkbox"/> 000-45-7891 | Regular      | Smith     | Joe        | \$0.00         | 8/1/2007   |          |             |            | Review | 2007 |

After you have checked the records you'd like to open, click the **Open** button. The first employee record will appear.

## Step 4: Enter employee information

Some data is pre-populated, such as SSN and name. Member Type will be populated with one of four member types:

1. AN – Non School Different Employer after retirement
2. AS – School Different Employer after retirement
3. AB – Retirees before 7/1/2006
4. AW – Same employer after retirement

**AN and AS** (Different employer): Employer contributions are due. They will be displayed for employees who began work on or after July 1, 2006.

**AB** (Same and different employer – before July 1, 2006): No employer contributions, but we do gather the information for reporting.

**AW** (Same employer): No employer contributions, but you must track this employee's compensation for the earnings limit.

One major difference for reporting working after retirement is that employees do not make contributions. But you do enter their gross compensation in the **Compensation** field. **Note:** If the employee worked at your employer before retirement, only enter the compensation related to employment after retirement.

If the employee has a date in the **End Date** field, select "Termination" in the **Reason Code** field.

Click the **Save And Validate** button if you want to save this employee's record and stay on this employee's record. You can also hit the **Enter** key on your keyboard to save and stay on this employee's record.

Click the **Save And Next** button to save this employee's record and go to the next employee's record.

When you are on the last employee record in the list on a page, only the Save and Validate button will appear. Not the Save and Next button. Click **Return** in the blue bar at the top of the screen to return to your original payroll detail listing all your pages.

Click the next **page #** to list the next ten records.

Click the next page # to list the next ten records.

## Step 4: Correct errors

While inside an employee's payroll record, click on the **Errors** tab in the lower part of the page. Any errors in payroll records must be corrected before you can submit your report.

The screenshot displays the 'payroll/DETAIL MAINTENANCE' page. At the top, a green bar contains 'Page Instructions'. Below it, a message reads 'Msg ID : 8 [ All changes successfully saved ]'. There are four buttons: 'Save And Validate', 'Refresh', 'KPERS-1R', and 'Report Totals'. The 'Payroll Information' section shows 'Detail Status : Review' and 'Header : Payroll'. The 'Payroll Dtl' section contains fields for SSN (511-12-3456), Member Type, First Name (Susie), Initial (M), Cntr. Type (Regular), Begin Date (5/26/2007), End Date, and Compensation (\$8,000.00). The 'Other Details' section has an 'Errors' tab selected, showing a table with one error: ID 638, 'Missing KPERS-1 form'. A red circle highlights the 'Errors' tab.

Roll your cursor over the error message to see a pop-up screen with information on how to resolve the error. If you still have questions, please call KPERS at 1-888-275-5737 and ask for Fiscal Services or e-mail [kpersFS@kpers.org](mailto:kpersFS@kpers.org).

Click the **Save And Validate** button in each payroll record to save your changes. Repeat until all errors are resolved in each payroll record.

If the error ID is 638 Missing KPERS-1 form, you need to complete a KPERS-1R enrollment screen. See KPERS-1R enrollment information in Step 5.

## Step 5: Create new employee records

If you have employees who do not appear in the Payroll/Detail Lookup list, KPERS does not have a record of them. You will need to create a new payroll record for each missing employee and complete a K-1R enrollment screen for them, too. If you do not need to create new records, skip to Step 6.

On the Site Menu, click **Payroll Detail**.

## payrollDETAIL LOOKUP

### Page Instructions

Msg ID : 1 [ 24 Records met the search criteria ]

### Search Criteria

|  |                                   |                     |                                  |
|--|-----------------------------------|---------------------|----------------------------------|
| Payroll Year :   | <input type="text" value="2007"/> | Reported SSN :      | <input type="text"/>             |
| Last Name :  | <input type="text"/>              | First Name :        | <input type="text"/>             |
| Department :   | <input type="text"/>              | Reason Code :       | <input type="text" value="All"/> |
| Status :   | <input type="text" value="All"/>  | Contribution Type : | <input type="text" value="All"/> |
| Error :  | <input type="text" value="All"/>  |                     |                                  |
| <input type="button" value="Search"/> <input type="button" value="Reset"/> |                                   |                     |                                  |

### Search Result

|                                    |                                     |  |              |               |                   |            |          |                |            |     |
|------------------------------------|-------------------------------------|--|--------------|---------------|-------------------|------------|----------|----------------|------------|-----|
| <input type="button" value="New"/> | <input type="button" value="Open"/> | <input type="button" value="ExportExcel"/> |              |               |                   |            |          |                |            |     |
| 1 2 3                              |                                     |  |              |               |                   |            |          |                |            |     |
| <input type="checkbox"/>           | SSN                                 | Payroll<br>Time                            | Last<br>Name | First<br>Name | Employee<br>Contr | Begin Date | End Date | Reason<br>Code | Department | Sta |

Click the **New** button.

A blank record will appear.

## payrollDETAIL MAINTENANCE

### Page Instructions

Msg ID : 7 [ Record displayed, please make changes and press save ]

|  |  |  |
|--|--|--|
| <input type="button" value="Save And Validate"/> | <input type="button" value="Refresh"/> | <input type="button" value="Report Totals"/> |
|--|--|--|

### Payroll Information

|                 |                        |
|-----------------|------------------------|
| Detail Status : | Header Status : Review |
| Receive Date :  | Payroll Year : 2007    |

### Payroll Dtl

|                |                      |                                     |                      |             |                      |
|----------------|----------------------|-------------------------------------|----------------------|-------------|----------------------|
| SSN :          | <input type="text"/> | Member Type :                       | <input type="text"/> |             |                      |
| First Name :   | <input type="text"/> | Initial :                           | <input type="text"/> | Last Name : | <input type="text"/> |
| Begin Date :   | <input type="text"/> | End Date :                          | <input type="text"/> | Reason :    | <input type="text"/> |
| Compensation : |                      | <input type="text" value="\$0.00"/> |                      |             |                      |

### Other Details

|                       |                             |          |
|-----------------------|-----------------------------|----------|
| Errors                | All records for this member |          |
| ID                    | Error                       | Severity |
| No records to display |                             |          |

Enter employee data in four fields.

1. SSN
2. Name
3. Begin Date
4. Compensation

The **Begin Date** for a "working after retirement" record is the employee's **new** begin date he or she returned to work after his or her retirement date.

Employees are required to wait 30 days after their retirement date before returning to work for any Retirement System employer. If they returned in 2007, the date they returned to work is the begin date that you would put in this field.

Click the **Save and Validate** button.

A 638 Missing KPERS-1 form error message will appear once you've saved the record, and a button to a KPERS 1R enrollment form will appear on the Payroll Detail Maintenance screen.

*payroll***DETAIL MAINTENANCE**

**Page Instructions**

Msg ID : 8 [ All changes successfully saved ]

Save And Validate Refresh **KPERS-1R** Report Totals

**Payroll Information**

Detail Status : Review Header Status : Review  
Receive Date : Payroll Year : 2007

**Payroll Dtl**

SSN : 000-06-6061 Member Type :  
First Name : Rocky Initial : J Last Name : Balboa  
Begin Date : 11/1/2007 End Date : Reason :  
Compensation : \$0.00

**Other Details**

Errors All records for this member

| ID  | Error                | Severity |
|-----|----------------------|----------|
| 638 | Missing KPERS-1 form | Error    |

Click the **KPERS 1R** button, and a KPERS -1R form will appear.

The Name and SSN should be pre-populated on the enrollment screen.

*enrollmen***MAINTENANCE**

**Page Instructions**

Msg ID : 7 [ Record displayed, please make changes and press save ]

Save Refresh

**Other Details**

Validation Info Employee's recorded history at KPERS

| Message ID            | Message | Severity |
|-----------------------|---------|----------|
| No records to display |         |          |

**Person Information**

Complete this section for all members

Status : Submitted : No

1. Enrollment Type :  Enroll as a new member  Transfer Membership  Return to payroll  Du

2. SSN : 000-06-6061

3. Member Name :  
First Name : Rocky Middle Initial : J

Please **fill in** the following five fields:

1. #1 – Enrollment Type, click **Enroll as a new member**
2. #5 – Birth Date
3. #6 – Gender
4. #10 – Date began employment
5. #1 in New Member Section – Membership Date

**Note:** Membership Date is the same date as date began employment after retirement. This is not the employee's original KPERS membership date.

5. Birth Date (MM/DD/YYYY) :  6. Gender :

7. Address :  
 Line 1 :   
 Line 2 :   
 City :  State :   
 Zip Code :

8. Department :

9. Member Category (if applicable) :  Elected Official  Legislator

10. Date began employment or Return to Payroll in a KPERS covered position (MM/DD/YYYY) :

11. Military Leave (please send discharge papers DD214) :  
 Without Pay Start Date :  Without Pay End Date :

12. Correctional Group (for State of Kansas Correctional Employees Only) :  
 If reporting a group change, please select Return to Payroll above and select the new group.

13. Board of Regents :

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**New Member Information**

*Complete this section for new members only*

1. Membership Date (MM/DD/YYYY) :

2. Non School Employees only :  
 Year of Service Salary :   
 Leave Without Pay Start Date :  Leave Without Pay End Date :

Click the **Save** button and the saved enrollment will appear. If all the information is entered correctly and there are no errors, a Submit button will appear on the screen. Click the **Submit** button to submit this enrollment to KPERS.

Repeat Step 5 for each new employee record.

## Step 6: Review totals and submit report

When you have entered compensation and enrollment information for all your working after retirement employees, click **Download/Total** on the site menu to review your report totals.

**Note:** The Download/Total screen only shows employee compensation and employer contributions owed for retirees who retired from a different employer and were hired by your employer on or after July 1, 2006.

### For Non-School employers

This page only shows the total compensation for the retirees with membership type "Non School Different Employer After Retirement" for calendar year 2007. To calculate the employer contribution, the system will take this compensation times the calendar year rate for 2007, showing the final amount due for 2007 in the Grand Total Contribution field.

No data entry is necessary for non-school employers. When all records are valid on the report, the button will darken and you can click the **Submit to KPERS** button.

*download / total***MAINTENANCE**

**Page Instructions**

Msg ID : 7 [ Record displayed, please make changes and press save ]

Save Refresh **Download File (Comma Delimited)** Submit to KPERS Download Detail Report (PDF)

**Other Details**

Errors Transactions Error Summary Transactions Status Summary

| ID  | Error                | Severity | Count |
|-----|----------------------|----------|-------|
| 638 | Missing KPERS-1 form | Error    | 3     |

**Payroll Information**

Payroll Year : 2007 Status : Unprocessed  
ER Rate Prd 1 : 0.1169 ER Rate Prd 2 : 0.1169  
Employee Compensation Prd 1 : \$41,500.00 Employee Compensation Prd 2 : \$41,500.00  
Total compensation displayed represents only the compensation subject to employer contributions ( Different

**Total Amounts**

Employee Compensation : \$83,000.00

### For School employers

You will be given a total of the Employee Compensation for Member Type –“School Different Employer After Retirement” for the calendar year, and you will need to complete the two fields telling KPERS how much was paid in the first six months and how much was paid in the second six months, due to the two different employer rates in effect for calendar year 2007. Then the system can calculate the final amount due. When all records are valid on the report, the button will darken and you can click the **Submit to KPERS** button.

## Step 10: Print or save report

After you have submitted your report, a Read Only message will appear on the Download Total Maintenance screen. Your report will be available in this location for future reference. You can download your report or print a copy.

Click the **Download File (Comma Delimited)** button for the report in a spreadsheet. If you save the file to your computer, you will be able to open it in a software program like MS Excel.

Click the **Download Detail Report (PDF)** button for the report as a PDF. If you save the file to your computer, you will be able to open the report with Adobe Acrobat Reader in the future.