myETF Employer Reporting Confirmation

Manual Work Report Instructions

- **Important**: The purpose of Confirmation is to **test your ability to submit payroll information**. It is for testing purposes only and will **not** be used to set up employee data in myETF.

- Employers who intend to submit payroll information manually in myETF should follow these steps. Employers who will submit payroll information on the Payroll File should follow the steps outlined in the myETF Employer Reporting Confirmation File Upload Instructions.

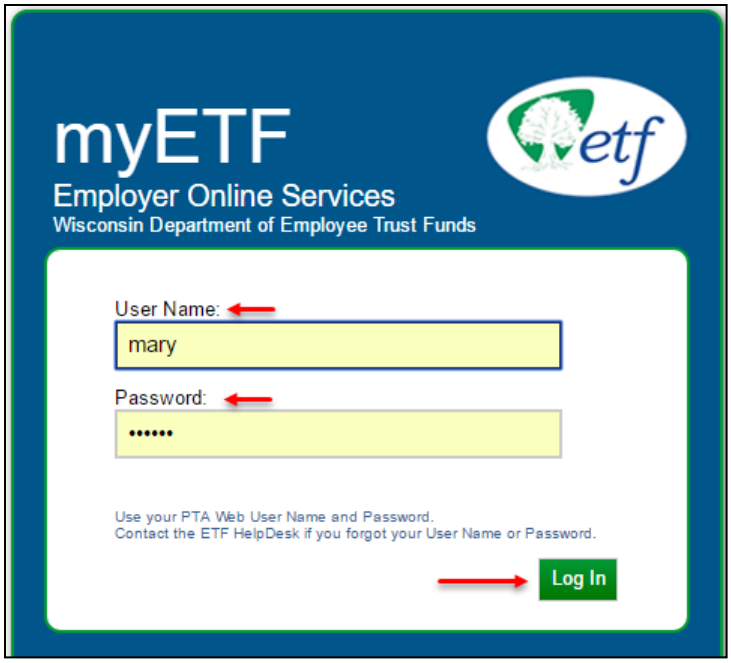
- These instructions explain how to successfully create and submit work reports manually. Please make sure you complete **all steps** listed in this document.

- The employees you submit on the manual work report you will create for Confirmation (testing) must be entered as **new hires during the reporting cycle you are testing** even if they already exist in ETF's systems. For example, if you confirm (test) a work report for a July 1 – 31, 2017 monthly reporting cycle, you must enter all employees on the work report as new hires starting employment with you between July 1 and July 31, 2017.

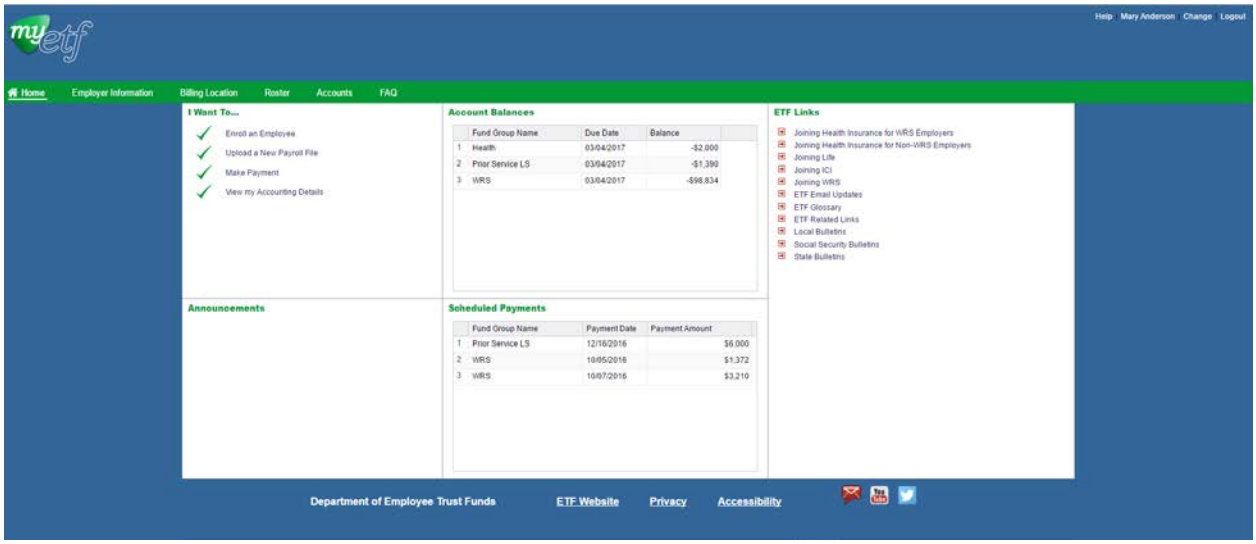
- Please see the myETF Solutions document on the myETF employer web pages for important and up to date information on known issues and work arounds needed for testing purposes.

Step 1 – Log In

1) Use your internet browser to access myETF Employer Online Services for Confirmation.
2) Enter your IAM user name and password. If you don't have an IAM user name and password, please complete and submit form ET-8928c.
3) Click **Log In**.

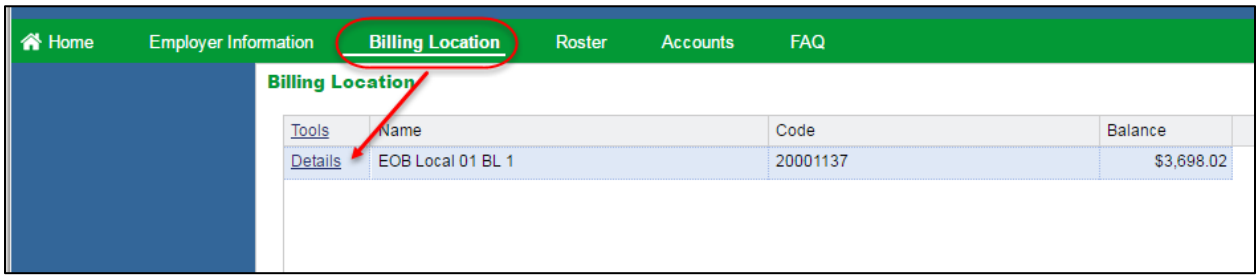


Your *Home* page displays.



Step 2 – Create or Update Reporting Cycle(s)

1) Select the *Billing Location* tab on the green bar.
2) Click the **Details** link next to the Billing Location Name. For most employers, the Billing Location is the same as the ETF Employer ID number (Employer Number).



myETF displays additional information specific to the selected billing location and the green bar displays billing location specific tabs.

3) Click the *Reporting Cycle* tab.

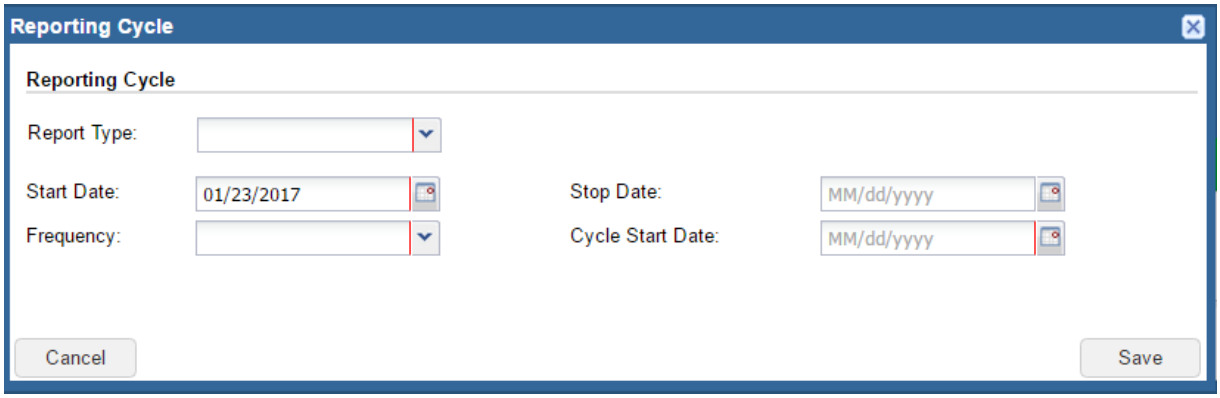
If you do <u>not</u> see a Reporting Cycle for the payroll reporting period that you intend to confirm, follow the instructions for Adding a Reporting Cycle below.

If you <u>do</u> see a Reporting Cycle for the payroll reporting period that you intend to confirm, scroll down to information on Updating a Reporting Cycle.

Adding a Reporting Cycle

4) Click **Add** to open the *Reporting Cycle* pop-up.

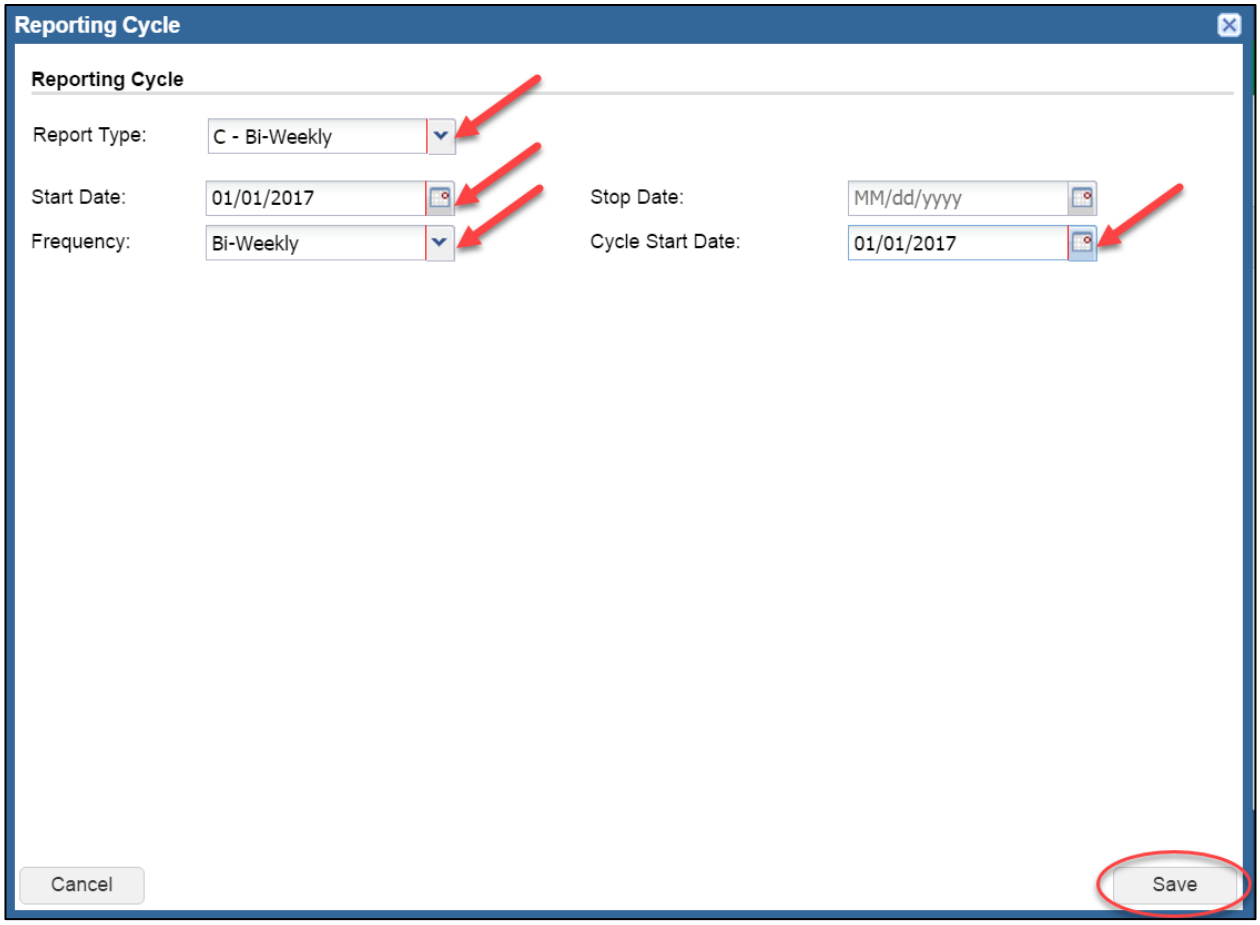
A blank *Reporting Cycle* pop-up displays with the current date populating the Start Date field.



5) Enter the following information in the *Reporting Cycle* pop-up.

- **Report Type**: Enter the **Reporting Cycle** for the file that you intend to confirm. Please see Appendix 4, Report Generation Type, of the myETF Payroll File Resource for further information.
- **Start Date**: Enter the **Start Date** of the payroll period for the file that you wish to confirm.
- **Frequency**: Enter the **Frequency** that matches the **Report Type** (Weekly, Bi-Weekly, Semi-Monthly, or Monthly)
- **Cycle Start Date**: Enter the **Cycle Start Date**. This must match the **Start Date** entered above.

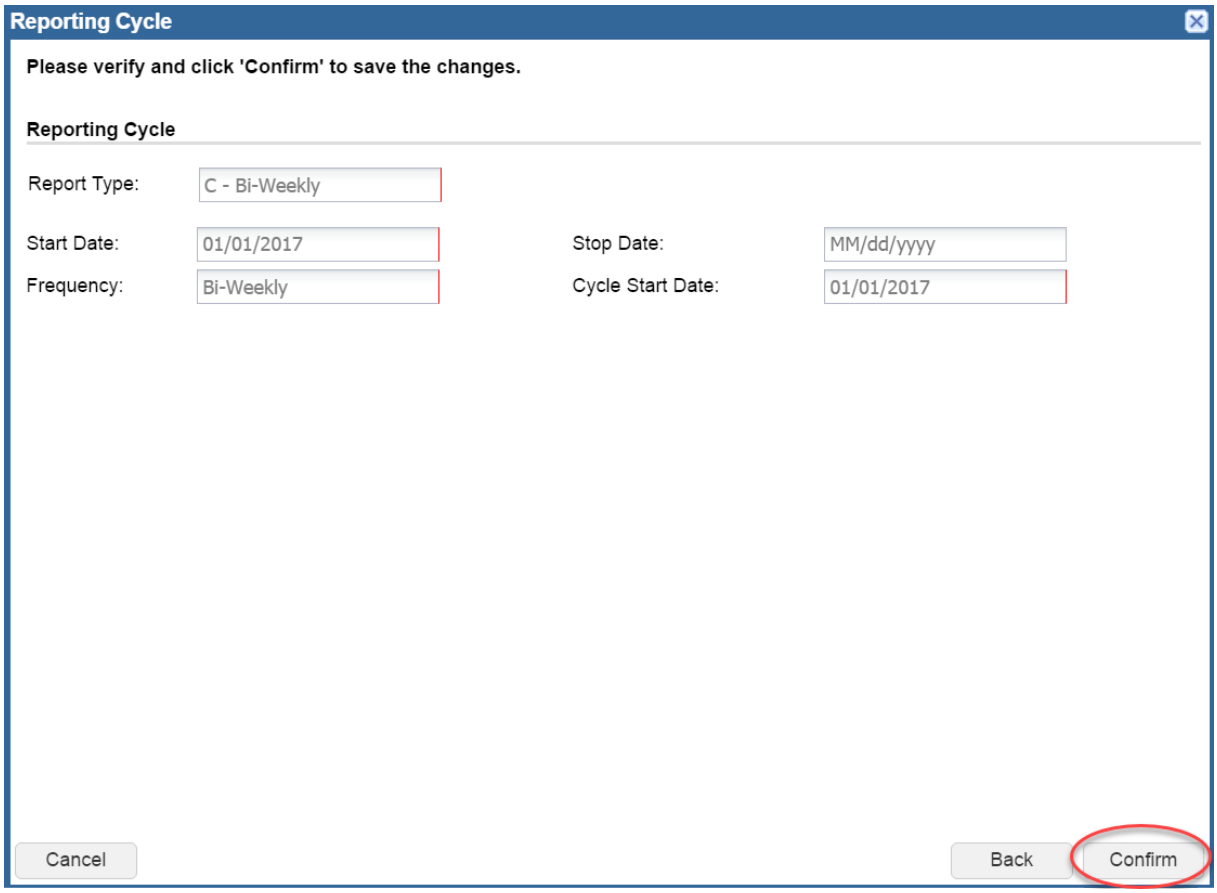
Note Do not enter a Stop Date when creating or updating a Reporting Cycle.



6) Click **Save** to retain the changes.

7) Review the information.

8) Click **Confirm** when the information is correct.

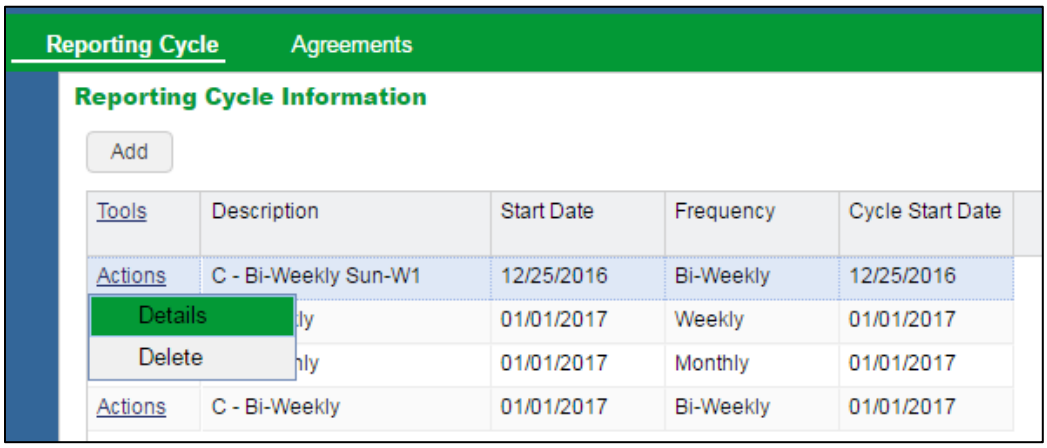


9) Click the **Back** button above the green bar to return to the *Billing Location* tab.

Updating a Reporting Cycle

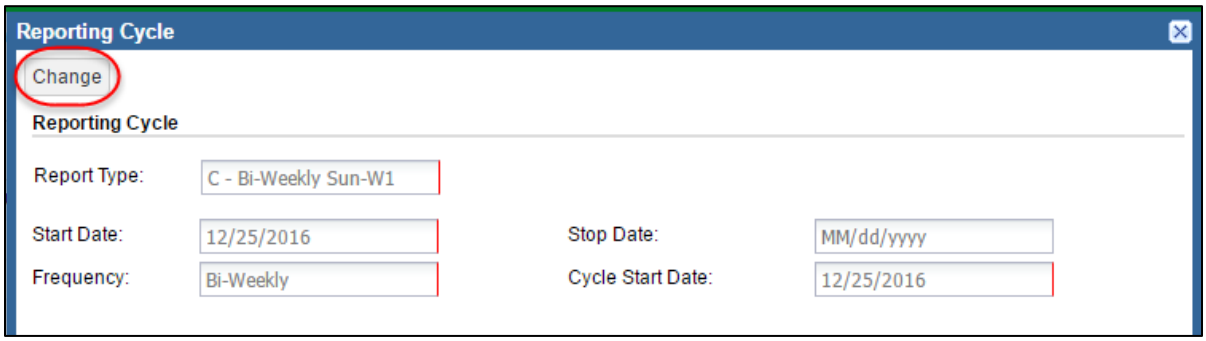
1) Click the **Actions** link next to the reporting cycle that needs to be changed.

2) Select **Details** from the options list to open the *Reporting Cycle* pop-up.



The Reporting Cycle's details display on the screen.

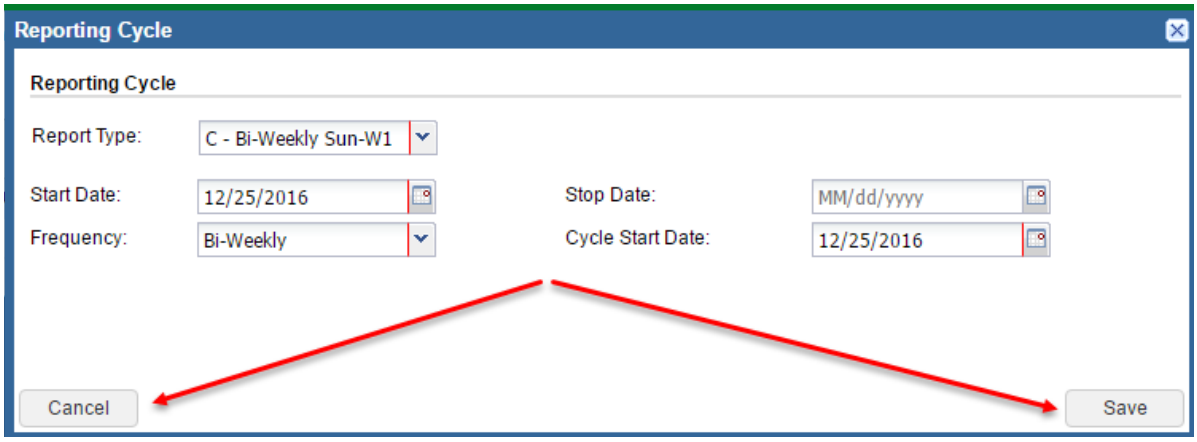
3) Click **Change** to put the pop-up in edit mode.



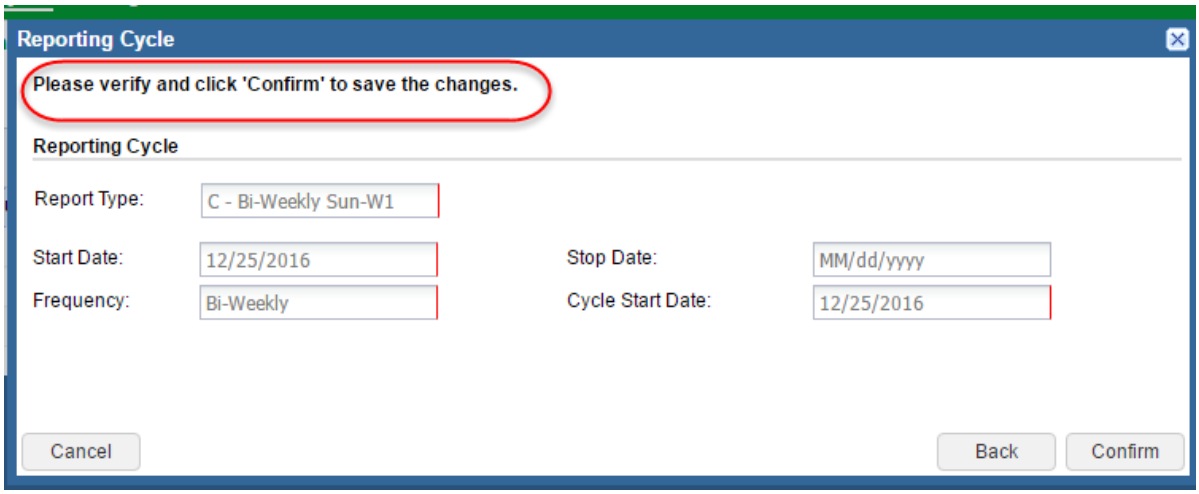
4) Update the information as needed.

Note The **Start Date** should be the first day of the payroll period in which you will upload a Payroll or Employment File, not the Pay Date.

5) Click **Save** to retain the changes (or **Cancel** to discontinue the changes).



A message displays at the top of the window.

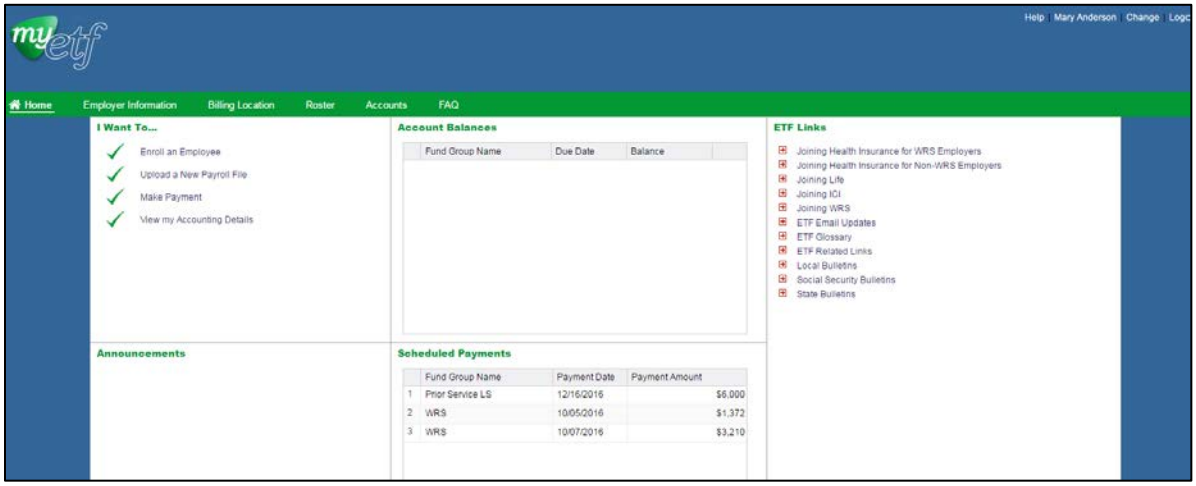


6) Click **Confirm** after reviewing that the information is correct (or **Back** to correct the information).

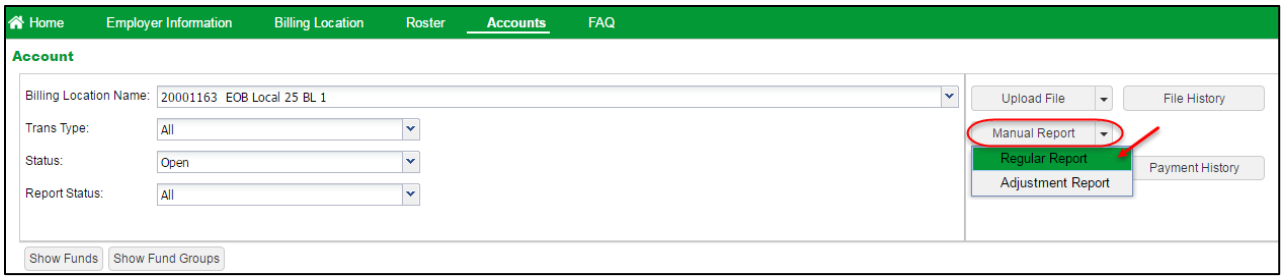
The pop-up closes and the changes are reflected in the Reporting Cycle Information grid.

Step 3 - Generating a Manual Work Report

1) Navigate back to the *Home* page.

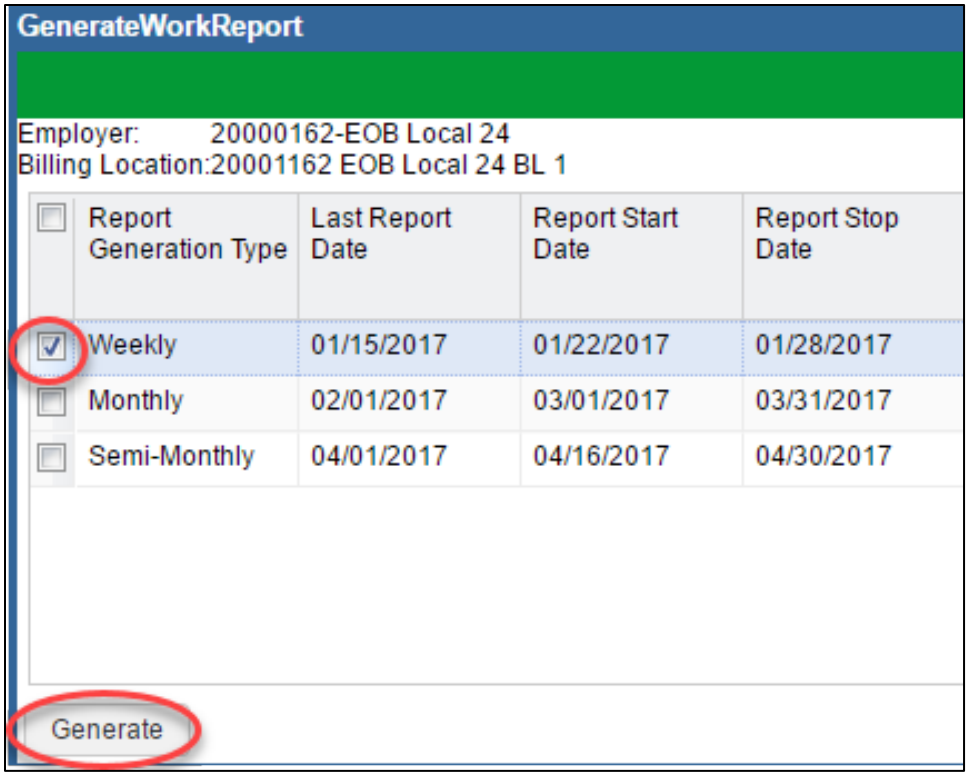


2) Click the *Accounts* tab on the green bar.
3) Click the **Manual Report** button.
4) Select the **Regular Report** option.



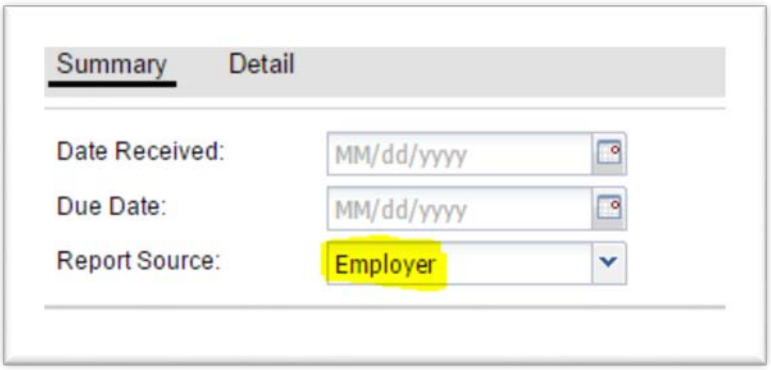
Result: The *Generate Work Report* pop-up displays on the window.

5) Click the check box next to the **Report Generation Type** for the work report you are creating.
6) Click **Generate**.



Result: The *Work Report Editor* > *Summary* tab displays in edit mode.

7) Select **Employer** as the **Report Source**.



8) Click the *Detail* tab on the *Work Report Editor* screen.

The *Detail* tab of the *Work Report Editor* displays.

Adding Existing Employees

1) Click the **Add Member** button to add a new row to the work report.

Note **Add Member** and **Add New Member** sound similar, but they have different functions. Add Member puts an existing employee on your roster, while Add New Member creates a new employee record.

2) Tab to the **Name** field and enter the member's last name, first name.

Result: myETF populates the **SSN** field based on the information in the employer roster.

3) Complete the information for the employee as if she/he were a **new hire** as required in the Payroll File Resource Document. In addition to applicable hours, earnings, and deduction information, you'll need to include:

Pay Date	Original Hire
Begin Date	Work Status
WRS Coverage Effective Date	Employment Status Change
Employment Status Change Start Date	Job Category
Estimated Annual Earnings	Employer Contribution Date
Program Code	

4) Click **Apply** to save each record and continue updating the work report.

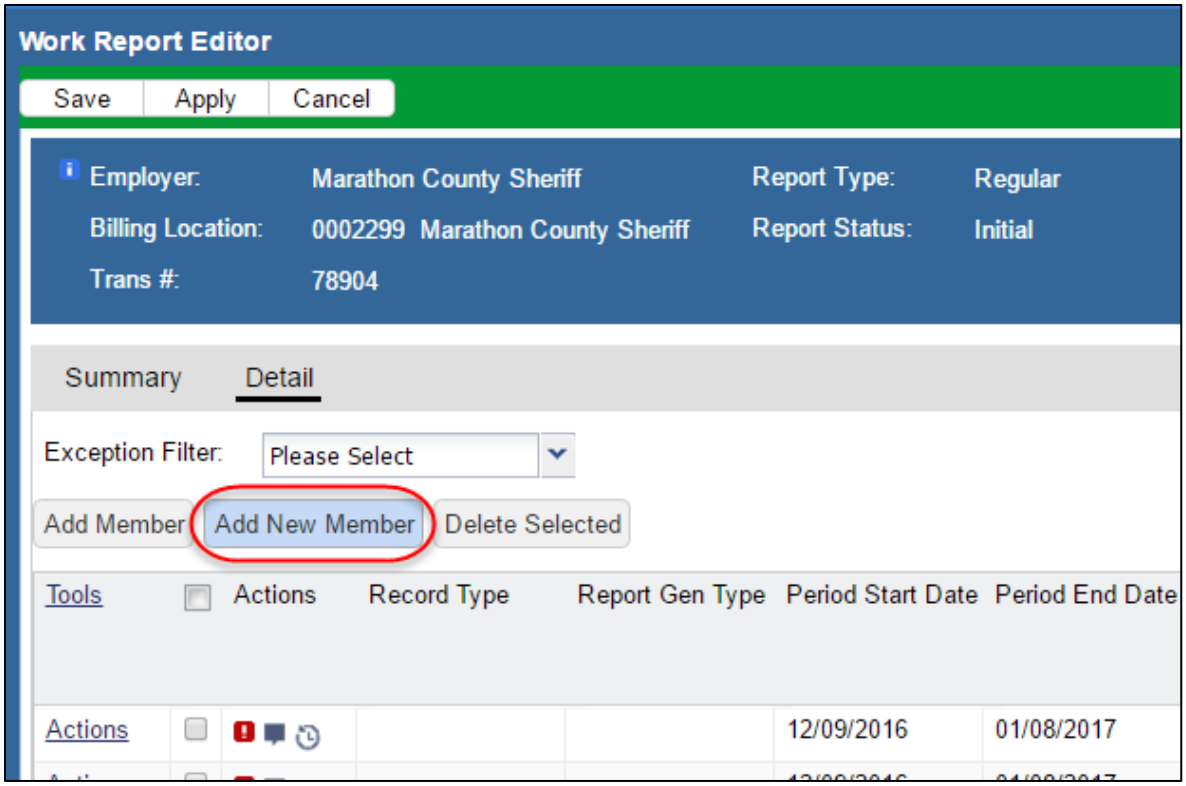
Adding New Employees

You can also add new employees who are not currently listed on your Roster tab to your work report, including:

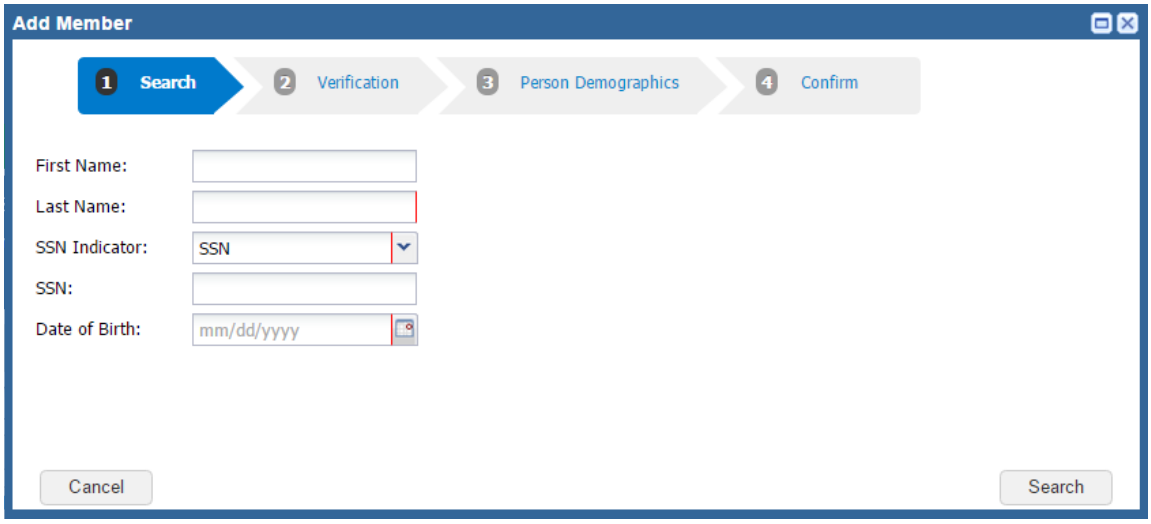
- ✓ Employees who began employment since your employee rosters were populated
- ✓ WRS Ineligible employees

From the *Work Report Editor* > *Detail* tab

1) Click the **Add New Member** button.



2) The *Add Member* wizard opens.



3) On the **Search** tab, enter the **First Name, Last Name, SSN, and Date of Birth** for the new member and click the **Search** button.

4) The **Verification** tab will confirm the results of your Search. If the member already exists in myETF, the member demographic is pre-populated by myETF.

5) On the **Person Demographics** tab, enter the member's Gender and any additional information related to the member, including the address, and click **Next**. Note that Gender is the only additional required field on this tab.

6) On the final **Confirm** tab, you must verify the information entered on the Search and Person Demographics tabs is correct and click Confirm. The new member will now appear in the Work Report Editor.

7) Repeat the process of adding your existing employees to the Work Report by selecting the Add Member button and typing in the employee's name.

8) Complete the information for each employee as if she/he were a **new hire** as required in the Payroll File Resource Document. You should use dates applicable to the Work Report you are creating. For example, if your Work Report is reporting payroll information for wages earned between May 1 and May 31, you should report each employee as a new hire (new employment record) using dates between May 1 and May 31.

   In addition to applicable hours, earnings, and deduction information, you'll need to include the following information for each employee record on the Work Report:

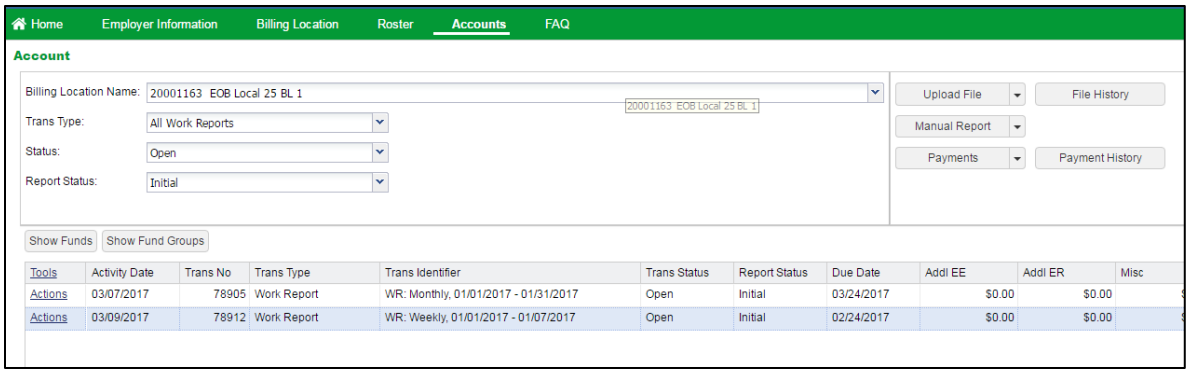
Pay Date	Original Hire
Begin Date	Work Status
WRS Coverage Effective Date	Employment Status Change
Employment Status Change Start Date	Job Category
Estimated Annual Earnings	Employer Contribution Date
Program Code	

9) Click **Apply** to save all changes and continue working, or **Save** to save changes and close the Work Report.

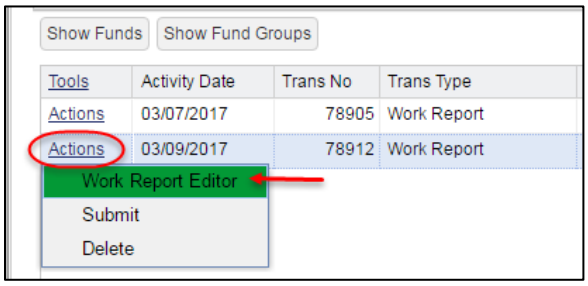
Step 4 – Correct and Submit the Work Report

Note If you are still in the Work Report Editor, skip ahead to step 7 below.

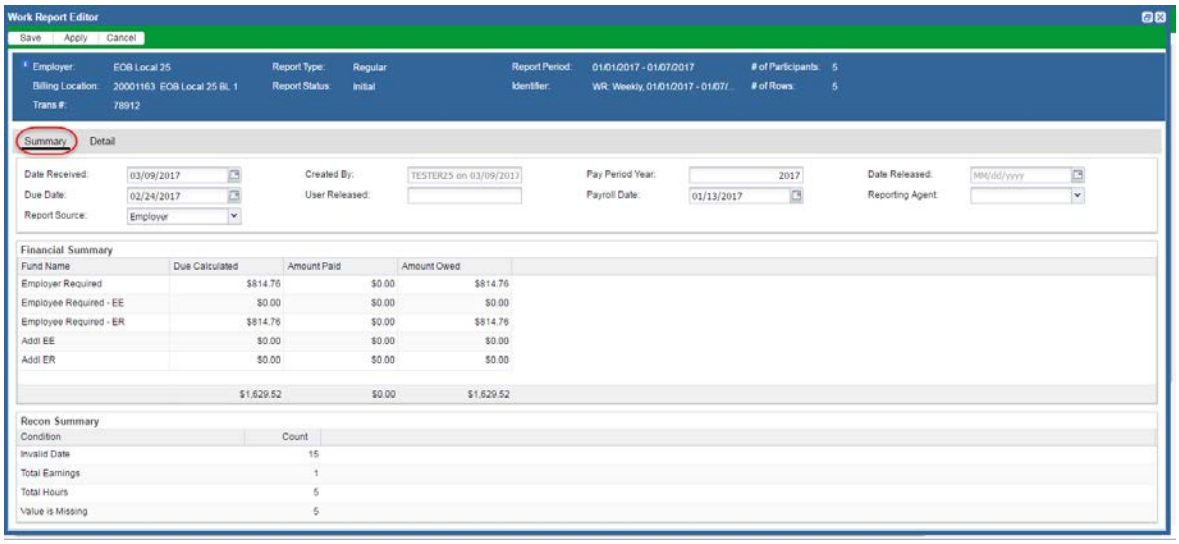
1) To find a Work Report you previously saved, click the *Accounts* tab.
2) The *Accounts* tab displays the transactions for the employer. Work reports appear in the transactions grid.



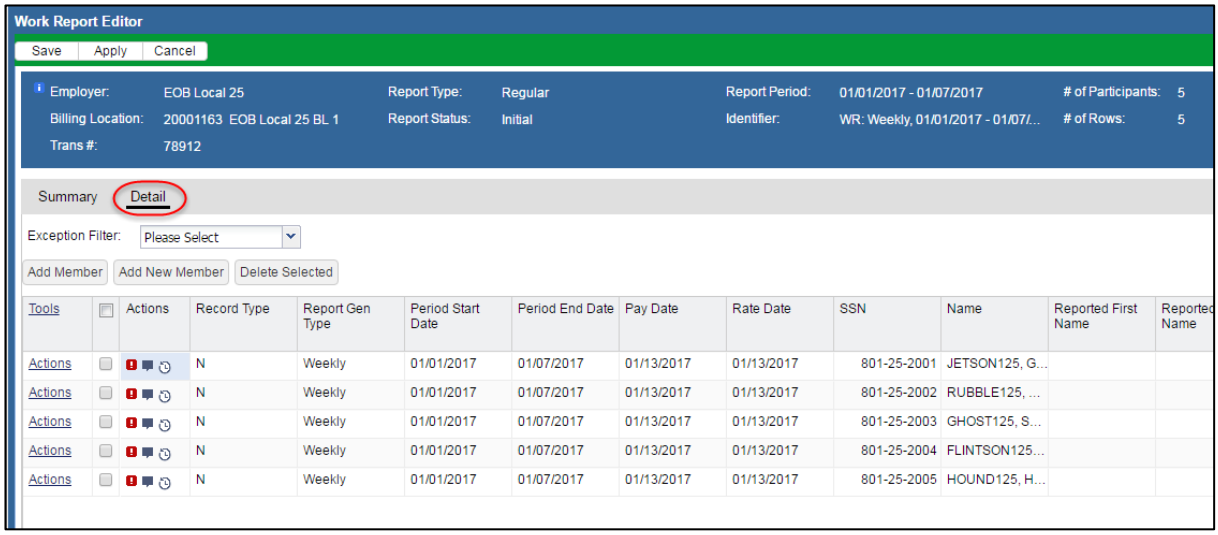
3) Click the **Actions** link next to the work report for the file you previously loaded.
4) Select **Work Report Editor** from the list of options.



5) The *Work Report Editor* window displays the *Summary* tab.



6) Click the *Detail* tab.



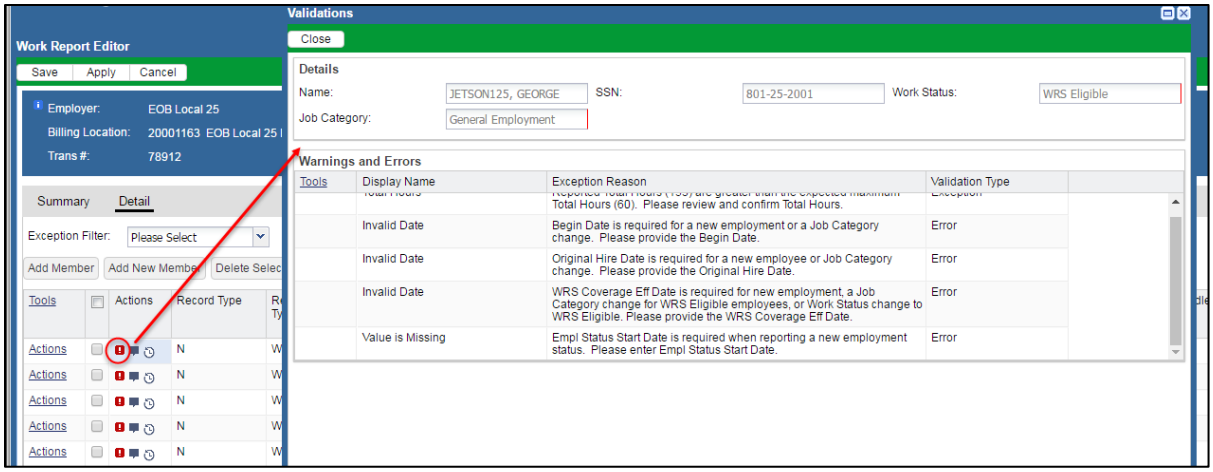
7) The *Detail* screen of the work report displays the rows (records) on the work report. The grid indicates which rows have errors, exceptions, or validated successfully using the icons shown below:

- → **Error**
- → **Exception**
- → **Validated Successfully**

Please see the myETF Payroll File Resource for further information on work report validations.

8) Click the **Validation** icon on the first record in your report.

9) The *Validations* popup displays the errors on the row. These need to be corrected.



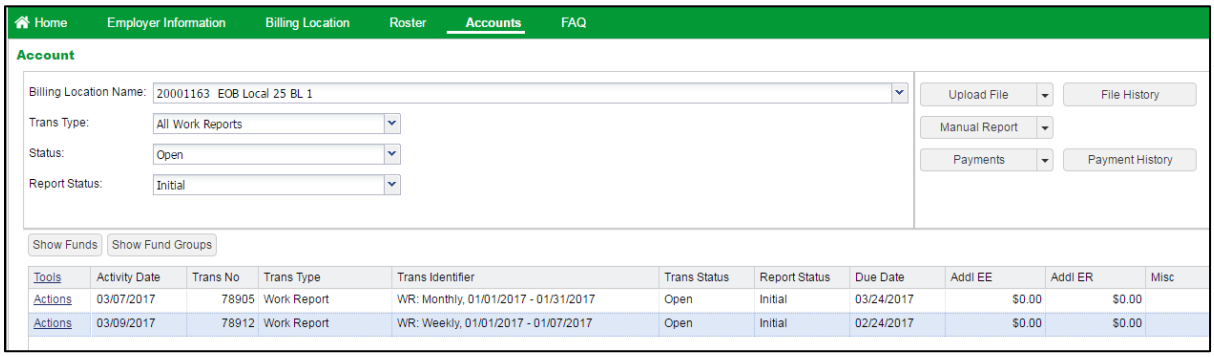
10) Correct the errors on the first record by using either the horizontal scroll bar or opening the *View Row Tool* pop-up (click the **Tools** link and select **View Row**: Click **Apply** to save the changes to the first record.

11) Correct the errors on the remaining records in the work report and then, click **Apply** after making the corrections, and update any remaining errors as needed.

12) Click **Save** after <u>all rows</u> show a **Validated Successfully** icon on the report.

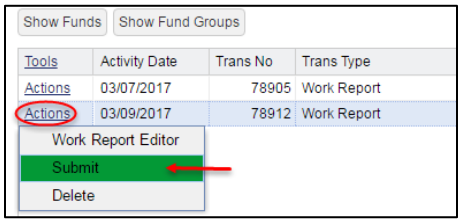
13) Close any open *Validation* popups that may be open.

14) The *Accounts* tab displays.



15) Click the **Actions** link next to your work report.

16) Select the **Submit** option.

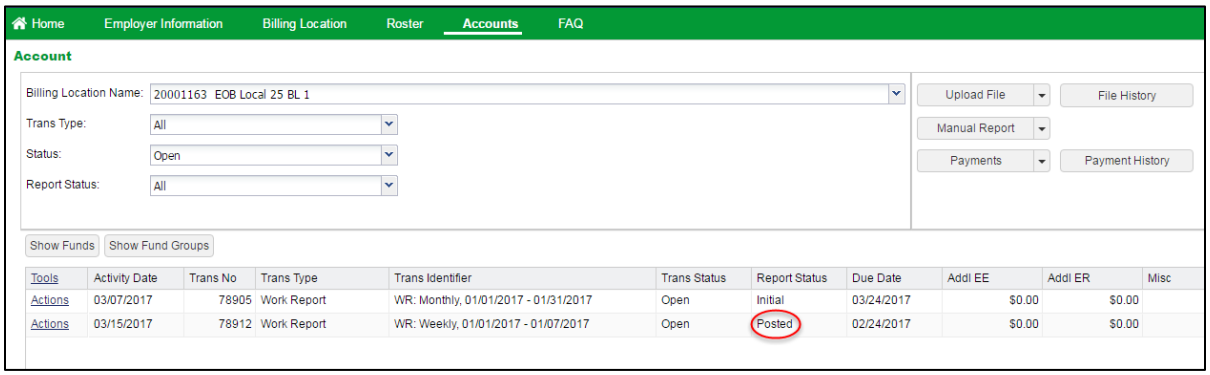


17) Click **Yes** in the *Confirm* pop-up to continue submitting the work report.

18) A *Success* message displays, indicating the selected work report was successfully queued for submission.

19) Click **OK** in the message.

20) The report is submitted to ETF. The Report Status may update to “Pending” and then to “Posted.” Please note that this may take a few minutes.



Congratulations! You submitted your first work report in myETF.

Please repeat this process beginning with Step 3 to generate a second Work Report containing at least one regular, ongoing payroll transaction with no changes, a termination, a job category change, and other employment status changes defined in the myETF Payroll File Resource as desired.