

## Viewing Wage and Contribution Reports

## Viewing the Year-to-Date Wage and Contribution Summary Overview

EDX allows you to view a summary report of wage and contribution data for all your employees for a particular target year. The report will only display one year at a time. If you choose mid-year to view a report for a target year, the report will only include employee wage and service (DTL2) records that have been submitted so far.

The report displays all DTL2 records, regardless of whether or not they have posted. Suspended records and valid errors are referred to on the report as “Not Posted.” If there are posted records but no suspended records, only the “posted” line will display. Conversely, if there are no posted records for an employee, only the “not posted” line will appear. If there are both posted and not posted records for an employee, a third line, Member Sub-total, will display the sum of posted and not posted wage, service, and contribution data.

EDX gives you the ability to sort and print the report and to copy the data into an Excel spreadsheet.

### Accessing the Summary

- 1 Log on to *Employer Home Page* screen following the instructions outlined on pages 6-8, “Logging on to EDX.”
- 2 Click on the **View Year-to-Date Wage and Contribution Summary** link (indicated by the arrow) to view the *Filter Your Report by Year* screen.



- 3 In the **Enter Year** text box, type in the report target year in the format YYYY.

- 4 Click the **Submit** button.

**Note:** Because of the amount of member information displayed on the record, EDX is unable to display all the data on screen at one time. Use the scroll bars (indicated by the arrows) to scroll the report vertically and horizontally to view all the information.

Year-to-Date Wage and Contribution Summary - Microsoft Internet Explorer

Address: http://ptr060.e#1990.pers.state.or.us:1106/SelfService/SAViewAnnReconRpt.do?

Retirement Resource

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with: BEND METRO PARK & RECREATION DIST

Year-to-Date Wage and Contribution Summary

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Member:       Go      Sort by Last Name: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)      Today: 07/10/2007

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Last Name	First Name	Hire Date	Contrib Start Date	EDX Records	Hours this ER	Hours Other ERs	Lump Sum Payout	Vacation Payout	Unit Contributions	Optnl ERIAP	Non-Subj Salary	Subject Salary	Gross Salary	Total Member Contribs
MOORE	MARTIN	07/01/2003	07/01/2003	Posted	2,079.96	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$33,306.00	\$33,306.00	\$1,998.36
Brauns	Jennifer	10/15/2005	05/01/2006	Posted	64.75	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$84.74	\$492.83	\$577.57	\$0.00
Picard Dimmig	Christy	11/16/2005	06/01/2006	Posted	24.50	443.76	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$406.64	\$406.64	\$0.00
BOETTNER	SUSAN	07/01/2003	07/01/2003	Posted	2,079.96	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$42,850.00	\$42,850.00	\$2,559.00
Gouldson	Kelly	04/08/2005	11/01/2005	Posted	80.25	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$302.50	\$1,002.64	\$1,305.14	\$0.00

## Report columns

Most of the columns appearing on the report screen are defined in the glossary; the rest are discussed below.

- **Hire Date**—PERS members whose records populated EDX from our previous database will show a hire date of 7/1/03, even though their actual hire dates may be earlier. For individuals hired after 7/1/03, EDX will indicate the actual hire date. In cases where EDX shows a hire date earlier than 7/1/03, an incorrect demographic (DTL1) record may have been submitted for a part-time employee or a correction made to a member's account.

If there is no hire date for an employee, you must submit a DTL1 record for suspended wage and service (DTL2) records to post. To see all employees for whom DTL1 records are missing, sort the entire report by Hire Date. EDX lists employees with data missing under the Hire Date column first.

- **EDX Records**—This is the only column of the report whose data you cannot sort. Listed in this column is the record status for each member: posted and not posted.
- **Hours this ER**—Hours the member worked for this employer. It is the sum of regular and overtime hours an employee worked.
- **Hours Other ERs**—Hours the employee worked for all other employers. It is the sum of regular and overtime hours an employee worked.
- **Total Member Contribs**—Represents total contributions reported for this member for the target year (e.g., posted, not posted, and subtotal) for each member. It includes any

amounts reported in member-paid pre-tax (MPPT), member-paid after-tax (MPAT), and employer-paid pre-tax (EPPT).

## Sorting

By default, the *Year-to-Date Wage and Contribution Summary* screen lists all employees in ascending order by SSN. There are two methods available for sorting information on the report: column header sort and alphabetical sort. In addition to sorting, you can also view a report for a single individual.

**Note:** The sorting function sorts the entire report only when you are on the original page of the report. If you choose to sort the entire report, you must first click on the **View Original Results** link; otherwise, EDX only sorts the page you are currently viewing.

### Sort using the column header

- To sort information in ascending order, click any one of the underscored column headers one time. To sort information in descending order, click any one of the underscored columns a second time. Clicking a column header a third time toggles to the previous display.

### Sort using the alphabet

- To sort alphabetically, click any one of the letters A–Z listed at the top of the report. Only employees whose last name begins with the letter you selected will appear.

### Selecting a single member

- Type the employee's SSN in the **Select a Member** text box (shown circled), and then click the **Go** button.

Year-to-Date Wage and Contribution Summary			
Year: 2006	Employer Number:	Employer Name: BEND METRO PARK & RECREATION DIST	
Select a Member:	<input type="text" value="111111111"/>	<input type="button" value="Go"/>	Sort by Last Name: <a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a> <a href="#">T</a> <a href="#">U</a> <a href="#">V</a> <a href="#">W</a> <a href="#">X</a> <a href="#">Y</a> <a href="#">Z</a>
	<a href="#">View Original Results</a>	<a href="#">View Totals</a>	<a href="#">Download as CSV</a>
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## Viewing a member's year-to-date wage and contribution details

- 1 Open the *Year-to-Date Wage and Contribution Summary* screen by following the steps outlined in the topic “Accessing the Summary” on pages 106–107.

- Click on the SSN link (highlighted by the box) associated with the employee whose year-to-date contribution details you want to view. EDX displays a report for that employee.

**Year-to-Date Wage and Contribution Summary**

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Select a Member:  **GO**      Sort by Last Name: [ABCDEFGHIJKLMNOPQRSTUVWXYZ](#)

[View Original Results](#)      [View Totals](#)      [Download as CSV](#)

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SSN	Last Name	First Name	Hire Date	Contrib Start Date	EDX Records	Hours this EB	Hours Other EBs	Lump Sum Payoff	Vacation Payoff	Unit Contributions	Ontrol ERIAP	Non-Subj Salary
<a href="#">111111111</a>	MOORE	Mandy	07/01/2003	07/01/2003	Posted	2,079.96	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">159487263</a>	Brown	Jennifer	10/15/2005	05/01/2006	Posted	64.75	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$84.74
<a href="#">987321654</a>	Swanson	Christy	11/16/2005	06/01/2006	Posted	24.50	443.76	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The *Year-to-Date Wage and Contribution Person Detail* screen that appears allows you to sort the member’s contributions details by report date or pay date (highlighted by the box).

**Year-to-Date Wage and Contribution Person Detail**

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

SSN: 111111111      Member Name: Moore, Mandy      Contribution Start D

[Return to Summary](#)      [Download as CSV](#)

**Posted Records**

Report Date	Pay Date	Wage Code	Transaction Type	Work Period Begin Date	Work Period End Date	Hours Reg	Hours OT	Subj Sal Reg	Subj Sal OT	Non Subject Salary	Lump Sum Payoff	Lump Sum Vac	Gross Salary	MPAT	MP
01/31/2006	01/31/2006	01	Regular wages			173.33	0.00	\$2,599.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,599.00	\$0.00	\$0.00
02/28/2006	02/28/2006	01	Regular wages			173.33	0.00	\$2,599.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,599.00	\$0.00	\$0.00
03/31/2006	03/31/2006	01	Regular wages			173.33	0.00	\$2,599.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,599.00	\$0.00	\$0.00

## Downloading the Wage and Contribution Summary to Excel

- If you are not already at the *Year-to-Date Wage and Contribution Summary* screen, display the screen following the steps outlined in the topic “Accessing the Summary” on pages 106–107.
- Click on the **Download as CSV** link (indicated by the arrow).

**Year-to-Date Wage and Contribution Summary**

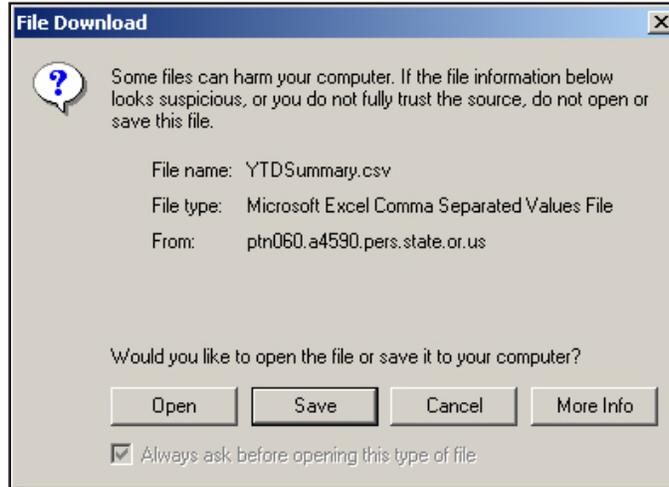
Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Select a Member:  **GO**      Sort by Last Name: [ABCDEFGHIJKLMNOPQRSTUVWXYZ](#)

[View Original Results](#)      [View Totals](#)      **Download as CSV**

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- 3 In the **File Download** dialog box that appears, click the **Open** button to view an Excel spreadsheet containing the wage and contribution details.



Once the file downloads, Excel opens with the Year-to-Date Wage and Contribution Summary information embedded in the spreadsheet, as shown below. You can use Excel to manipulate and save the data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S		
	SSN	Last Name	First Name	Status	Co	Pay Date	Hours Wor	Hours Wor	Wage Cod	Subject	St	Non-Subje	Gross Sal	Lump-Surr	MPAT	MPPT	Unit	EPPT	Opt ER	IAI	Op
1	00000000	BARR	MARY	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$305.04		0	
2	00000000	BARR	MARY	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$281.04		0	
3	11111111	FREIHEIT	THOMAS	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$158.32		0	
4	11111111	FREIHEIT	THOMAS	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$158.32		0	
5	22222222	JOHNSON	MATTHEW	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$158.59		0	
6	22222222	JOHNSON	MATTHEW	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$158.59		0	
7	33333333	NELSON	PAULA	SUSP		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$0.00		0	
8	33333333	NELSON	PAULA	SUSP		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$0.00		0	
9	44444444	TODD	ARTHUR	PSTD		5/27/2005	80	23	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$162.95		0	
10	44444444	TODD	ARTHUR	PSTD		5/13/2005	80	10	1	#####			\$0.00	#####	\$0.00	\$0.00	\$2.56	\$140.57		0	
11	55555555	GATES	MICHAEL	PSTD		5/13/2005	2.5	0	2	\$27.31			\$0.00	\$27.31	\$0.00	\$0.00	\$0.00	\$0.00		0	
12	66666666	MORRISO	DANIEL	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$75.86		0	
13	66666666	MORRISO	DANIEL	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$75.86		0	
14	77777777	POTTER	HARRY	PSTD		5/27/2005	80	18	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$128.77		0	
15	77777777	POTTER	HARRY	PSTD		5/13/2005	80	23.25	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$138.24		0	
16	88888888	DAWES	SHARON	PSTD		5/27/2005	64	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$77.87		0	
17	88888888	DAWES	SHARON	PSTD		5/13/2005	64	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$77.87		0	
18	99999999	BRODIE	MICHAEL	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$147.16		0	
19	99999999	BRODIE	MICHAEL	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$147.16		0	
20	12121212	JESUP	ROSEMA	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$75.76		0	
21	12121212	JESUP	ROSEMA	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$75.76		0	
22	21212121	OLSON	JIMMY	PSTD		5/27/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$166.59		0	
23	21212121	OLSON	JIMMY	PSTD		5/13/2005	80	0	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$166.59		0	
24	31313131	ELLIOTT	TERRY	PSTD		5/27/2005	80	4	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$148.21		0	
25	31313131	ELLIOTT	TERRY	PSTD		5/13/2005	80	5	1	#####			\$0.00	#####	\$0.00	\$0.00	\$0.00	\$150.78		0	
26	13131313	SNOW	LORENZO	PSTD		5/27/2005	40	0	7	\$0.00		\$595.54	\$595.54	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		0	
27	13131313	SNOW	LORENZO	PSTD		5/13/2005	40	0	7	\$0.00		\$595.54	\$595.54	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		0	

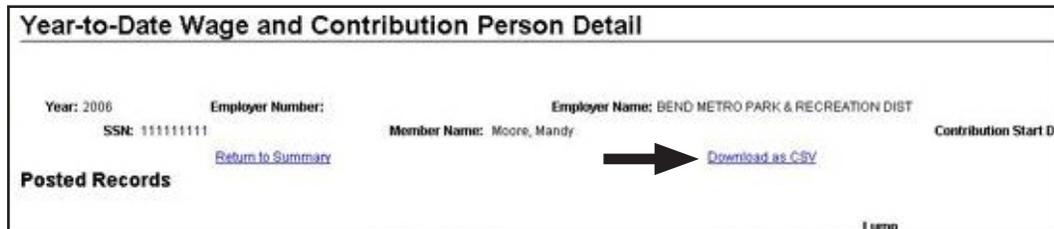
**Note:** The pound sign (#) will appear in the spreadsheet if the cell is too small to display the value. You will need to resize the column.

- 4 On the *Year-to-Date Wage and Contribution Summary* screen, click on the **View Original Results** link (indicated by the arrow) to return to the default (sorted by SSN) *Year-to-Date Wage and Contribution Summary* screen. Use this link if you need to sort the entire report by SSN.

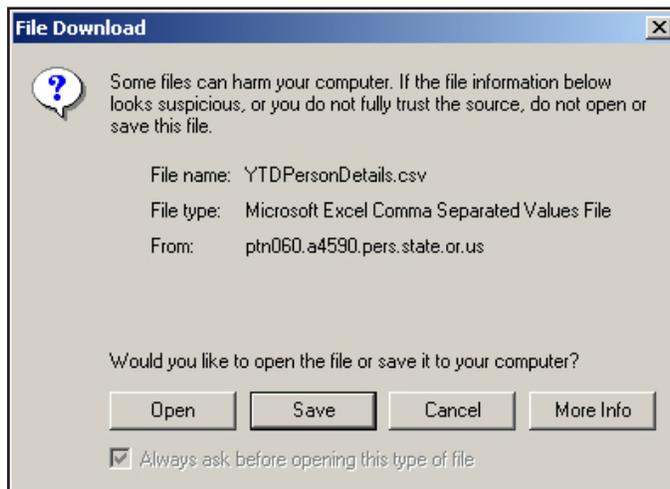


## Downloading a member's year-to-date report to Excel

- 1 If you are not already at the *Year-to-Date Wage and Contribution Person Detail* screen, open that page by following the steps listed under “Viewing a member’s year-to-date wage and contribution details” on page 108.
- 2 Click on the **Download to CSV** link (indicated by the arrow).



- 3 In the **File Download** dialog box that appears on screen, click the **Open** button to view an Excel spreadsheet containing the wage and contribution details.



Once the file downloads, Excel opens with the Year-to-Date Wage and Contribution Summary information embedded in the spreadsheet, as shown below. You can use Excel to manipulate and save the data.

A1	Status	Report Date	Pay Date	Wage Cod	Transactio	Work Peri	Work Peri	Hours Reg	Hours OT	Subj Sal R	Subj Sal C	Non-Subje	Lump-Sum	Lump-Sum	Gross Sal	MPAT	MPPT	EP
2	Posted	1/31/2005	1/21/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
3	Posted	1/31/2005	1/7/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
4	Posted	2/28/2005	2/18/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
5	Posted	2/28/2005	2/4/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
6	Posted	3/31/2005	3/4/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
7	Posted	3/31/2005	3/18/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
8	Posted	4/30/2005	4/29/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
9	Posted	4/30/2005	4/15/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
10	Posted	4/30/2005	4/1/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
11	Posted	5/31/2005	5/27/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$
12	Posted	5/31/2005	5/13/2005	1	Regular wages			80	0	#####	\$0.00	\$0.00	\$0.00	\$0.00	#####	\$0.00	\$0.00	\$

**Note:** The pound symbol (#) will appear in the spreadsheet if the cell is too small to display the value. You will need to resize the column.

## Printing a report

- On the *Year-to-Date Wage and Contribution Summary* screen, click on the **Print Report** link (indicated by the arrow) to print a hard copy of the data as it is displayed on screen. The **Print Report** link is available on the *Year-to-Date Wage and Contribution Summary* and *Year-to-Date Wage and Contribution Person Detail* screens.

**Important:** If you choose to print the Year-to-Date Wage and Contribution Summary, set the page layout in your Print Manager to **Landscape** to print all the data.

Last Name	First Name	Hire Date	Contrib Start Date	EDX Records	Hours this EB	Hours Other EBs	Lump Sum Payoff	Vacation Payoff	Unit Contributions	Contl ER/MP	Non-Subj Salary	Subject Salary	Gross Salary	Total Membr Contribs
MOORE	Mandy	07/01/2003	07/01/2003	Posted	2,079.96	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$33,306.00	\$33,306.00	\$1,998.36
Brown	Jennifer	10/15/2005	05/01/2006	Posted	64.75	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$84.74	\$492.83	\$577.57	\$0.00

## Viewing summary totals

- 1 On the *Year-to-Date Wage and Contribution Summary* screen, click on the **View Totals** link (indicated by the arrow).

**Year-to-Date Wage and Contribution Summary**

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Select a Member:        Sort by Last Name: [ABCDEFGHIJKLMNOPQRSTUVWXYZ](#)

[View Original Results](#)       [View Totals](#)      [Download as CSV](#)

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The *Year-to-Date Wage and Contribution Summary Totals* screen appears, providing you an overall summary of a particular year's reported wages and contributions.

**Year-to-Date Wage and Contribution Summary Totals**

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Today's Date: 03/20/2007

[View Original Results](#)      [Print Report](#)

	Hours this ER	Hours Other ERs	Gross Salary	Lump Sum Payoff	Lump Sum Vacation Payoff	Unit Contributions	Optnl ER IAP	Non-Subj Salry	Subject Salary	Total Membr Contribs
<b>MEMBER TOTALS:</b>	292,851.85	50,515.15	\$4,582,533.68	\$21,871.43	\$452.80	\$0.00	\$0.00	\$33,244.86	\$4,526,964.59	\$226,516.50
<b>Total Payments Received from January 1, 2006 through December 31, 2006:</b>									\$599,787.96	

- 2 Click on the **View Original Results** link (indicated by the arrow) to return to the *Year-to-Date Wage and Contribution Summary* screen. Summary information will be sorted by SSN.

**Year-to-Date Wage and Contribution Summary**

Year: 2006      Employer Number:      Employer Name: BEND METRO PARK & RECREATION DIST

Select a Member:        Sort by Last Name: [ABCDEFGHIJKLMNOPQRSTUVWXYZ](#)

 [View Original Results](#)      [View Totals](#)      [Download as CSV](#)

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