



the Latest Word

For IPERS Employers

Iowa Public Employees' Retirement System | Winter 2008/2009

WHAT IT MEANS

Each 0.5 percentage point increase raises an employee's contributions by \$20 a year for each \$10,000 of wages. The employer's increase is \$30 a year. An employee in IPERS' regular membership class with annual IPERS-covered wages of \$40,000 will pay \$80 more, or about \$6.67 a month. The employer will pay \$120 more for that employee, or \$10 a month.

A protection occupation member who was already in that class will see a contribution increase of slightly more than 0.5 percentage point compared to fiscal year 2009. The employer's increase is 0.75 percentage point.

Members moving from the regular class to the protection occupation class will notice the greatest change. Protection occupation members, sheriffs, and deputies pay higher contributions than regular members because those classes receive higher retirement, disability, and death benefits.

FUTURE CHANGES

During the 2008 legislative session, the legislature gave IPERS the authority to set future contribution rates for regular members, starting July 1, 2011, based on IPERS' actuarial valuation. IPERS' actuary completes the valuation, which is an evaluation of IPERS' financial condition at a point in time, every year. This snapshot shows the contribution rates necessary to fund promised benefits that will be paid in the future. To complete the valuation, the actuary makes certain assumptions the IPERS Investment Board has approved, such as when people will retire, how long they will live in retirement, and the rate of return on investments. IPERS already uses a valuation to set the rates for sheriffs, deputies, and members in protection occupations.

All contribution rates increase July 1, 2009

The IPERS contribution rate for regular members will increase 0.5 percentage point, to 10.95 percent, effective July 1, 2009. This is the third of four adjustments approved by the Iowa Legislature in 2006, the first time the legislature increased the rate since 1979.

About 95 percent of all IPERS members are in the regular membership class. Employers and employees will continue to share responsibility for paying contributions as they have in the past. Employers pay about 60 percent while employees pay about 40 percent.

Rates for sheriffs and deputy sheriffs will also increase slightly. The 0.2 percentage point increase will be shared equally by employees and employers.

The rate for protection occupation members increases the most out of IPERS' three membership classes, with an increase of 1.26 percentage points. The number of protection




occupation members increased by over 2,200 members, an increase of about 46 percent. An increase that large changed the characteristics of the entire membership class, which affects contributions.

Four groups of employees moved from the regular membership class to the protection occupation class, after the legislature approved requests from jailers, emergency medical service providers, military installation guards, and county attorney investigators. The Department of Corrections, in cooperation with the Department of Administrative Services, also designated 77 additional state correctional employees as protection occupation members.

Protection occupation employees and their employers will continue to share responsibility for paying contributions as they have in the past, with the employers paying about 60 percent and the employees paying about 40 percent.

CONTRIBUTION RATES EFFECTIVE JULY 1, 2009–JUNE 30, 2010

(Percent of IPERS-covered wages)

MEMBERSHIP CLASS	MEMBER SHARE	EMPLOYER SHARE	TOTAL
 REGULAR MEMBERS	4.30%	6.65%	10.95%
 SHERIFFS & DEPUTIES	7.62%	7.62%	15.24%
 PROTECTION OCCUPATIONS	6.14%	9.20%	15.34%



Answers to common I-Que questions

Q: Why does IPERS continue to mail monthly detail reports and remittance coupons to me?

A: You are receiving these items in the mail because your delivery preference is set to U.S. mail in I-Que. To change your delivery preference to e-mail, there must be an e-mail address on file for your agency's reporting official.

To add an e-mail address for a reporting official: From within I-Que, go to Home > View/Update Employer Information > Contacts. Enter your e-mail address on this page and click Save.

To set delivery preference as e-mail: Go to Home > Employer Management > View/Update Delivery Preference. Choose E-mail from the drop-down menu and click Save.

Q: When I manually enter a wage report, I can't find a print screen so I can print the report.

A: To print a wage report entered in I-Que, you must first release it.

To print a released wage report: Go to Home > Wages, Transactions, Payment Manager > Wage Reports. Highlight the report you want to print and click View Wage Reports. A new screen with a print option will appear.

Q: I imported my wage report file and processed it with errors. Can I correct the file or do I need to start over?

A: You can correct the file without starting over.

To correct an imported wage report: Go to Home > Wages, Transactions, Payment Manager > Wage Report. Highlight the prebill and click on Edit Wage Report. Once the Wage Report Editor opens, you can correct wages, dates of birth, and other information, and add members to the report. When you finish making changes, click Save.

If an error message appears, you must correct the error and click Save again. If there are errors, it will not save the information you added. Verify the contributions due. If correct, click Release.

Q: I released a wage report that included incorrect wages. How can I correct the wage report?

A: You cannot edit a wage report that you have already released. You must submit a wage reporting adjustment.

To submit a wage reporting adjustment through I-Que: On <www.ipers.org>, go to Employers > Employer Forms > Wage Adjustment Import Spreadsheet. Click on the MS Excel file. A dialog box will pop up, asking if you want to open or save the file. Save the Excel file to your desktop. Close the Excel Web document. Open the Wage Adjustment Import Spreadsheet from your desktop. Select Enable Macros. There are two tabs at the bottom, Instructions and Import Data. Select the Import Data sheet to enter the required information. When finished, click Create Import File. Your saved file will be stamped with a date and time to help identify the import file.

Log in to I-Que and go to Home > Import Wage/Wage Adjustment File. Click New and a box will open. Change the import name to Employer Wage Adjustment Reporting. Click Browse to find the import file you created. Enter an import description and save the file. Click Validate and Refresh. If there are no errors with your report, click Process and Refresh. Finally, go to Wages, Transactions, Payment Manager > Wage Report. Verify the information and click Release. IPERS will verify the wage reporting adjustment report and complete the process. The resulting balance or credit due will be reported to you on your next Employer Monthly Statement.

If you don't have Internet access, IPERS can fax or mail you the *Wage Reporting Adjustment(s)* form. You can return the completed form to IPERS by mail or fax.

Q: Where do I view the errors on my import file?

A: You can get a detailed report of only member records with errors.

To view errors on your import file: Go to Import Wage/Wage Adjustment Files. Click View Report to bring up a new screen. On that screen, change the Detail Record Status from All to Errors in the drop-down menu. Click Show Report. It will display a detailed report of only those members who had errors instead of all members on the report. Print the report so you will have the information at your fingertips when correcting member information in the I-Que database or the information in your software payroll file.

Q: The errors on my import file are mainly last names and birthdates. What's the best way to fix these errors?

A: You need to determine the source of the errors – the information already in I-Que or the information in your import file.

If wrong information is in I-Que: Go to View/Update Member Information. In the Select Member box, type the member's social security number or last name. Click Search. Select the member from the list and you will be brought to the member's demographics page where you may edit the member's name, birthdate, and other demographic information. Click Save at the bottom of the page when you are done.

If wrong information is in your import file: Under Import Files, click on Import Wage/Wage Adjustment. Click on the Import Details tab at the top of the page. In the Filter box at the top of the page, change



THANKS MEANS THANKS— NO MATTER WHO SAYS IT!

We turn our computers off and back on. They tell us to reboot. We call them glitches. They call them bugs. We work to clean up inaccurate and out-of-date information. They call it data cleansing. We get frustrated when we have to wait. They call it a bandwidth problem.

Technology professionals don't always speak the same language as most people do. But one word that I-Que technology personnel and other IPERS staff agree on when discussing employers is "Thanks."

Thank you for attending training and changing how you report to IPERS. Thank you for waiting patiently when we were having some problems with I-Que's response time. Thank you for understanding when we had to take I-Que offline so we could fix a few glitches (um, bugs).

Although a million and one things could have gone wrong, we had relatively few problems. And we had many successes. Here are a few things that worked well.

- 1,107 employers, more than half, enrolled one or more staff members in I-Que training.
- About 91 percent of employers reported online for July and August by the September 30 deadline. Only 52 percent of employers used to submit wage reports online in the former system, ICON.
- Employers called the I-Que HelpDesk when they needed help.
 - From August 18, when I-Que went live, to September 30, HelpDesk staff handled almost 3,900 calls.
 - In I-Que's first month, the HelpDesk received an average of about 160 calls a day. The number dropped to about 76 calls a day in the second month.

Employer I-Que HelpDesk

1-877-IPERS-99

(1-877-473-7799)

Monday–Friday, 8 a.m.–4:30 p.m.

the Process Flag drop-down from All to Errors. Click the Filter button. The rows from your wage report that contain errors will now be displayed in the Match Total box. Correct the errors, then click Save.

You may also void the import, fix the information in your payroll file, and reimport the file into I-Que. Once you have fixed the errors, click Validate again and Refresh.

To avoid making the same errors next month, be sure to correct the information in your payroll file.

Q: Where do I manually enter employee wages for the next month?

A: Enter wages manually in I-Que's employer management section.

To enter employee wages manually:

Go to Home > Wages, Transactions, Payment Manager. Select the Wage Report tab at the top of the screen. Look for reports called prebills where the wage reports are listed. Look at the description column. Choose the prebill that contains the month and year of the report you wish to submit. Click on that prebill, then click Edit Wage Report. You are now ready to enter your wages on the prebill. Type the wages into the Period Wages column, click Save, and then click Close. You will now be back on the Wage Report screen. Make sure the wage report you are working on is still highlighted, verify the amount due is correct, and then click Release.

Q: Will I receive a confirmation message that I have completed the wage reporting process after I release my wage report?

A: No. After you release a wage report, the Report Status will change from Prebill to Released and the User Released field will be updated with your user ID.

Q: If I schedule an EFT payment, will I get a confirmation message after that payment processes?

A: No. You need to check your EFT history for scheduled payments that have been processed. See Process Your Online EFT Payment > EFT History.

Q: I am a new reporting official. How do I add my information?

A: Welcome to IPERS and I-Que!

To add new reporting official

information to I-Que: If the former reporting official is still available to log in to I-Que, have him or her go to Home and select View/Update User Information listed under Administration Functions. Select View/Update Employer Users and click on the name of the former reporting official that you replaced. Click in the Username box and change the username to your new username. The new username should be your agency's five-digit employer ID, followed by your first initial, followed by the first six letters of your last name. You will also need to change the first and last names listed below the Username box, and update the Address Information box, which includes phone numbers and e-mail addresses. Finally, click Save at the bottom of the page.

If the former reporting official is no longer available to log in and make these changes, you can add information for a new reporting official by completing the *Employer Account Demographics* form and mailing it to IPERS. IPERS will make the changes for you and mail you your new username and a temporary password. The form is on IPERS' Web site.



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Certification period allowed for county jailers

Iowa law allows employees who are in, but are not yet certified for, a Special Service position to be an IPERS Special Service member while earning needed certification. This also applies to county jailers.

IPERS includes noncertified employees in one of the two Special Service classes while the employees earn necessary certification only if both of the following conditions are met:

- 1) The employer hires the employee to fill a Special Service position.
- 2) The employee performs Special Service duties while becoming certified.

The law that moved county jailers from IPERS' regular membership class to the protection occupation class on July 1 includes certification as one of the conditions for meeting the definition of a jailer.

"A jailer or detention officer who performs duties as a jailer, including but not limited to the transportation of inmates, who is certified as having completed jailer training pursuant to chapter 80B, and who is employed by a county as a jailer." Senate File 2424, which amends Iowa Code section 97B.49B(1)(e)

Reporting officials should include an employee who is hired as a jailer and performs jailer duties but who is not yet certified as a county jailer in the protection occupation class. Apply protection occupation contribution rates while the employee seeks jailer certification during the interim certification period allowed by law, beginning with the hire date.

CEILING ON COVERED WAGES IS \$245,000 IN 2009

Beginning in January 2009, do not report or withhold contributions on wages above \$245,000 as IPERS-covered wages. The IRS increased its wage limitation from \$230,000 to \$245,000, and IPERS follows the IRS limit. The change is effective January 1–December 31, 2009.

IPERS no longer monitors covered wages by prorating wages for members with multiple employers. IPERS now accepts all wages until a member has reached the IRS limit. IPERS will notify employers who report wages over the limit and will return any excess contributions.