

Retirement Exception Report - R5806333

Overview

This report was created for NPERS, however, larger agencies may find it useful to correctly identify employees who should be enrolled in the retirement plans. The report will show employees who are expected to be enrolled in various retirement plans across the State (State, judges, or patrol).

This work instruction shows how to run the Retirement Exception Report.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website:

<http://www.das.state.ne.us/>

Navigation

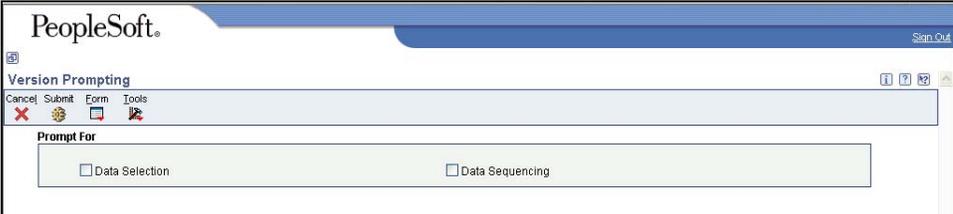
Click Roles, HR_PR. (Citrix users – right click on the menu, choose View by Role, choose HR_PR.)

Human Resources and Payroll - Agencies > Inquiries and Reports > HR/Payroll Reports > Benefit Reports > Retirement Reports > Retirement Exceptions.

Steps

Run the Retirement Exception Report

Start this instruction from the Version Prompting window.



1. Choose **Data Selection**, click **Submit**. The Data Selection window appears.

Operator	Left Operand	Comparison	Right Operand
Where	Business Unit (F060116) (MCU) [BC]	is not equal to	" S500000000- S599999999"
And	Employment Status (F060116) (EST) [BC]	is not equal to	"A,B,E,F,H,I,J,K,M,N,O,R,U,X,Z"
And	Date-Participation (F060116) (PADT) [BC]	is less than or equal to	jdDateParticipation [R]
And	Date - Pay Period Ending (F06156) (PPED) [BC]	is greater than or equal to	jdUserDefinedDate001 [R]
And	Date-Participation (F060116) (PADT) [BC]	is less than or equal to	jdUserDefinedDate002 [R]
And			

2. Data Selection is already completed and can be left as is.

If "PO" appears in the Right Operand field of a Data Selection line, criteria for that Data Selection will be available on the Processing Options window.

3. Click **OK**. The Processing Options window appears.

4. On the Date tab, enter the **month, year, and century** for the time period in which you want your information.

This report can be run for any period within any Fiscal Year by changing the Processing Options here.

5. On the Deduction tab, the deductions are predetermined. Enter any retirement deduction code needed.

6. Click **OK**. The Printer Selection window will appear.



7. On the Document Setup tab, ensure CSV (Comma Delimited) is checked.
 -  The report can also be run in PDF, but the CSV output is much easier to read.
8. Click **OK** to run the report and return to the menu.
 -  View the Report via Submit Job or View Job Status. For step-by-step instructions, please refer to the [Working with Submitted Reports](#) work instructions. Choose the Job Details to view (R5806333...) once the Description is "Done".

Microsoft Excel - Retirement_Exception_Report_Example_CSV.xls

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

8 B I A

Anal

Reply with Changes... End Review...

B35 ROWLEY, MARGARET M

A	B	C	D	E	F	G	H	I	J	K	L	M
1	R5806333							STATE OF NEBRASKA				9/6/2005 9:58:57
2	NIS0001							Retirement Exceptions				1 of
3	Address	Adj. Service Date	Orig Start Date	Last Start Date	Emp St	Pay St	Business Unit	Gross Pay	Report Month	Check Date		
4	Number	Alpha Name					Pay Period End Dates					
5	12345	LANE, JANE M	4/7/1988 1/26/1983	8/1/1988		0	S031220046		Aug-05	8/1/2005		
6	12345	LANE, JANE M	4/7/1988 1/26/1983	8/1/1988		0	S031220046		Aug-05	9/1/2005		
7	110196	LYONS, RACHEL J	8/25/1988 1/21/1986	1/21/1986	C	0	S031233110		Aug-05	8/1/2005		
8	110196	LYONS, RACHEL J	8/25/1988 1/21/1986	1/21/1986	C	0	S031233110		Aug-05	8/31/2005		
9	123059	SMITH, PAT W	4/25/2003 1/5/2000	1/5/2000	C	0	S031233110		Aug-05	8/1/2005		
10	123059	SMITH, PAT W	4/25/2003 1/5/2000	1/5/2000	C	0	S031233110		Aug-05	8/31/2005		
11	400274	RYAN, RITA P	9/23/2002 9/23/2002	9/23/2002	S	T	S031233110		Aug-05	8/31/2005		
12	115187	GORDON, STACEY R	7/18/1997 1/31/1984	1/31/1984	C	0	S031233610		Aug-05	8/1/2005		
13	115187	GORDON, STACEY R	7/18/1997 1/31/1984	1/31/1984	C	0	S031233610		Aug-05	8/31/2005		
14	115247	LUNDEBURT, ROBERT H	9/13/2002 1/8/1997	1/8/1997	C	0	S031233610		Aug-05	8/1/2005		
15	115247	LUNDEBURT, ROBERT H	9/13/2002 1/8/1997	1/8/1997	C	0	S031233610		Aug-05	8/31/2005		
16	119159	WITZKI, WHITNEY	1/28/2002 3/31/1977	1/8/1997	C	0	S031233610		Aug-05	8/1/2005		
17	119159	WITZKI, WHITNEY	1/28/2002 3/31/1977	1/8/1997	C	0	S031233610		Aug-05	8/31/2005		
18	126061	FOSTER, DAVE G	1/31/2002 1/31/1996	1/31/1996	C	0	S031233610		Aug-05	8/1/2005		
19	126061	FOSTER, DAVE G	1/31/2002 1/31/1996	1/31/1996	C	0	S031233610		Aug-05	8/31/2005		
20	120608	WILSON, BOB A	9/9/1992 9/9/1992	9/9/1992	C	T	S050039606		Aug-05	8/6/2005		
21	119292	SMITH, CAROLYN A	9/21/1994 9/21/1994	9/21/1994	C	0	S050039606	484.83	Aug-05	8/1/2005		
22	119292	SMITH, CAROLYN A	9/21/1994 9/21/1994	9/21/1994	C	0	S050039606	294.26	Aug-05	8/31/2005		
23	306822	MILLER, PATRICIA I	3/20/2002 3/20/2002	3/20/2002	C	0	S050039658	475.58	Aug-05	8/1/2005		
24	306822	MILLER, PATRICIA I	3/20/2002 3/20/2002	3/20/2002	C	0	S050039658	475.58	Aug-05	8/31/2005		
25	1846538	TITUS, ASHLEY E	7/1/2004 7/1/2004	7/1/2004	C	0	S071000000	1386.56	Aug-05	8/1/2005		
26	1846538	TITUS, ASHLEY E	7/1/2004 7/1/2004	7/1/2004	C	0	S071000000	1386.56	Aug-05	8/31/2005		
27	120898	NELSON, THOMAS E	11/29/1978 9/11/1978	6/29/2005	S	T	S120000000	1187.31	Aug-05	9/1/2005		
28	584300	JONES, DANIEL R	1/12/2004 10/1/2002	10/1/2002	C	0	S130000000		Aug-05	8/1/2005		
29	584300	JONES, DANIEL R	1/12/2004 10/1/2002	10/1/2002	C	0	S130000000		Aug-05	8/31/2005		
30	125373	MILLER, RACHEL E	8/17/1988 8/17/1988	8/17/1988	C	T	S150001010		Aug-05	8/9/2005		
31	113439	VANDEN, RANDY L	11/21/1987 11/21/1987	11/21/1987	C	0	S160000000		Aug-05	8/2/2005		
32	119646	SCHROED, ALLAN R	3/8/1992 2/6/1989	4/18/2005	C	0	S160000000	1576.58	Aug-05	8/1/2005		
33	119646	SCHROED, ALLAN R	3/8/1992 2/6/1989	4/18/2005	C	0	S160000000	1576.6	Aug-05	8/31/2005		
34	126520	ROWLEY, MARGARET M	1/26/2003 1/24/2000	8/22/2005	C	0	S160000000	711.94	Aug-05	8/1/2005		
35	126520	ROWLEY, MARGARET M	1/26/2003 1/24/2000	8/22/2005	C	0	S160000000	800.93	Aug-05	8/31/2005		

Ready