



Next Year Payroll Process

2021-2022

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Next Year Payroll Process

The purpose of this document is to guide users through the necessary steps to create the next year payroll. This process includes updating tables and employee information, calculating salaries, performing edits, and interfacing payroll to Budget. This process occurs in the next year and does not interfere with the current year processing.

IMPORTANT: Each LEA will have unique situations. Some of the images and examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

This document assumes that you are familiar with the basic features of the TxEIS Business System and have reviewed the [TxEIS Business Overview guide](#).

Before You Begin

[Before you begin.](#)

[Things to remember prior to starting the next year payroll process.](#)

- Ensure open communication exists between the payroll office and business office.
 - Verify that the Budget process is complete and the budget is open.
 - Set potential deadlines for various presentations.
- Verify that you are logged on to the current pay frequency.
- Remember:** Next year calculations and distributions are validated to the new budget (N). Make sure that the fiscal year on the distribution pages match what is in the new budget (N). If it changes during the process, perform a mass update.

[Current and next year shared pages.](#)

The following Human Resources pages are shared between the current year and next year. Use **caution** when updating these pages in the next year:

- Tables > District HR Options
- Tables > Credential
- Tables > Tax/Deductions
- Tables > Bank Codes
- Maintenance > Staff Demo (all tabs)
- Maintenance > Staff Job/Pay Data > Employment Info

[Process prerequisites.](#)

Gather Beneficial Data

This section is strictly for informational purposes.

Before performing the next year payroll process, gather the following data as it will be beneficial while you are completing the process.

Proposed/Approved Next Year Salary Schedule

[Human Resources](#) > [Maintenance](#) > [Staff Job/Pay Data](#) > [Job Info](#)

Once a salary table is assigned to an employee on this tab, the table can be updated and salary calculations can be run for all affected employees eliminating the need to update the information for each individual employee.

Tables > Salaries SessionTimer: 59 min and 55 sec

Save

Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint

Records

Pay Grade: TBA Retrieve Print

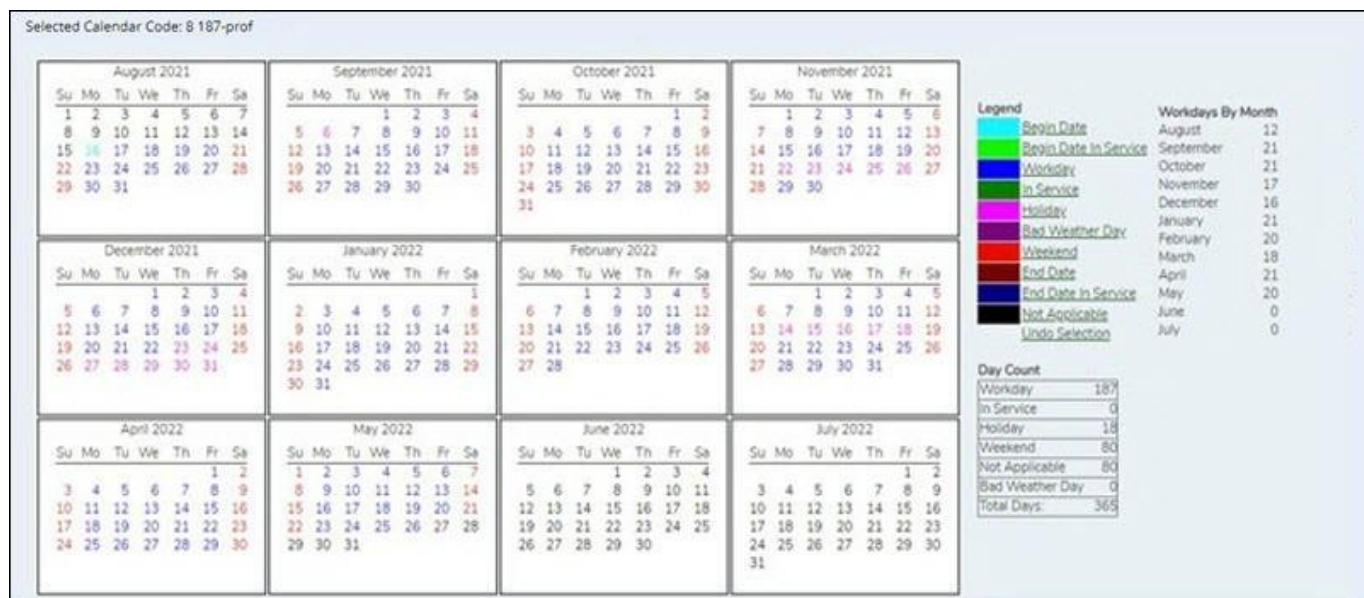
Pay Step: All

Delete	Pay Grade	Pay Step	Max Days Employed	Local Sched	Annual Amt
	TBA	00	182		34,100.00
	TBA	01	182		35,100.00
	TBA	02	182		35,950.00
	TBA	02	207	1	35,950.00
	TBA	03	182		36,700.00
	TBA	03	207	1	36,700.00

Proposed/Approved Next Year Workday Calendars

[Human Resources](#) > [Tables](#) > [Workday Calendars](#) > [School Calendar](#)

After receiving the upcoming approved school year calendars, you can create calendar(s) to assist with documenting employee workdays and holidays.



Reference State Minimum Salary Schedule

Review the [TEA Minimum Salary Schedules](https://tea.texas.gov/Texas_Educators/Salary_and_Service_Record/Minimum_Salary_Schedules) and update information as needed or import salary data. (https://tea.texas.gov/Texas_Educators/Salary_and_Service_Record/Minimum_Salary_Schedules)

Accrual Calendar Information

[Human Resources](#) > [Tables](#) > [Workday Calendars](#) > [Accrual Calendar](#)

Delete	Details	Accrual Code	Total Days Worked
		A	187.0
		B	189.0
		C	172.0
		D	0.0

Delete	Pay Date	Days Worked
	09-15-2021	20.00
	10-15-2021	20.00
	11-15-2021	18.00
	12-15-2021	15.00

- Creating and assigning an accrual calendar to employees maintains the accrual calculations throughout the school year. You can obtain workdays by month information from the workday calendars.
- Be sure to keep the same accrual codes for each accrual calendar. This method allows for consistency and eliminates the need to update the information for each individual employee.
- Accounting for the August EOY accrued days in the accrual calendar and using the EOY Payroll Accruals process assists in properly accounting for accruals across the fiscal years.

Update Next Year Staffing Changes

When payroll opens for the next year, be sure to keep up with the following staffing updates:

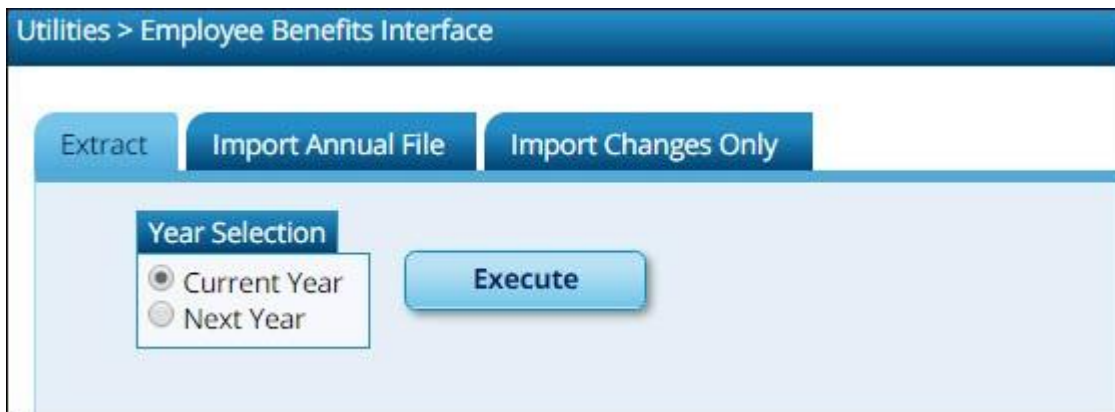
- **Resignations and new hires:** Update the employee status as resignations and new hires are approved to allow the appropriate budget amounts to be created and interfaced.
- **Campus level changes:** Update the job table and employment information as jobs move from one campus to another.
- **Distribution changes:** Update employee distributions based on budget changes.
- **Update extra duty/stipend pay:** Update the extra duty table to reflect changes and payments. Also, update the balance on the [Human Resources > Maintenance > Staff Job/Pay Data > Pay Info](#) tab. The next year payroll budget calculations use the s-type extra duty remaining amount; therefore, it is important to verify that these amounts have been updated.
- **Update substitute pay:** If substitute pay rates change, update the [Human Resources > Tables > Salaries > Substitute](#) tab, which is associated with entering employee substitute leave transmittals.

Extract Third Party Vendor (benefits) Information

[Human Resources > Utilities > Employee Benefits Interface > Extract](#)

Perform an extract to create the files containing deductions and demographic data to be sent to the third-party vendor.

Only deduction codes that have an **Extract Ded Cd** (extract deduction code) on the [deduction code table](#) are extracted.



After the new premiums are updated by the third-party vendor and the file is returned, you can import the updated file making the changes to the next year deductions in one step.

[Human Resources](#) > [Utilities](#) > [Employee Benefits Interface](#) > [Import Annual File](#)

This utility imports the next year employee benefit choices via a file created by your third party vendor. Importing data decreases the amount of time it takes to enter individual employee data changes.

Manage Employee Change Requests

- Create a form for next year employee change requests. This form assists with data entry and provides documentation.
- Set a deadline for employee change requests prior to the end of the current school year to allow time for clarification if needed.
- Update employee direct deposit information. Use caution when updating this information in the next year frequency as the system will prompt you to update this information in the current year frequency.
- If you have not already done so, set up the EmployeePortal application. EmployeePortal allows employees to submit demographic changes and payroll (W-4 and direct deposit) changes. LEA-defined options determine what changes can be made by the employee and the necessary approvals.

1

Verify August EOY Payroll Accruals

Verify August EOY payroll accruals.

□ If TxEIS is used for the EOY payroll accruals, verify that the accrual reversal process was completed in September 2020. This process should have been interfaced to Finance in August 2020.

Log on to Finance file ID 0.



Finance > Inquiry > General Ledger Inquiry > General Ledger Inquiry

Fund	Func	Obj	Sobj	Org	Prog	Description	Amount			
GJ	P60308	03-20-2020	03	MAR		PAYROLL DISTRIBUTION	18,197.22			
GJ	P60410	04-23-2020	04	APR		PAYROLL DISTRIBUTION	17,552.94			
GJ	SATAY1	04-30-2020	04	MAY		PAYROLL DISTRIBUTION	15,101.99			
GJ	SAJOR	04-30-2020	04	MAY		PAYROLL DISTRIBUTION	13,436.91			
GJ	P60510	05-22-2020	04	MAY		PAYROLL DISTRIBUTION	31,629.12			
GJ	P60510	05-30-2020	05	MAY		PAYROLL DISTRIBUTION	18,626.74			
GJ	P60610	06-20-2020	06	JUN		PAYROLL DISTRIBUTION	15,670.08			
GJ	P60710	07-23-2020	07	JUL		PAYROLL DISTRIBUTION	8,298.17			
GJ	P60809	08-15-2020	08	AUG		PAYROLL DISTRIBUTION	8,886.40			
GJ	EOYACC	08-31-2020	08	AUG		PAYROLL ACCRU DISTRIBUTI	12,874.37			
** Ending							-231,119.00	0.00	264,088.91	32,969.91

- Type 199.11.6119 or 199.00.2161 in the **Fund, Function, and Object Code** fields.
- Leave all other fields masked (Xs).
- Click **Retrieve**.
- Verify that “**Payroll Accrual**” (or an LEA-defined description) with a positive expenditure amount was posted (typically in August 2020).

Log on to Finance file ID C.

Finance > Inquiry > General Ledger Inquiry > General Ledger Inquiry

Finance

Version: User: File ID: C Account Period: 02

SessionTimer: 59 min and 28 sec County/District #:

General Ledger Inquiry | General Ledger Account Summary | Employee Distribution List Inquiry | Over Expended Account Summary

Processed Current Period: 10 Next Period: 11 Include soft encumbrances when POs exist Exclude Objects 61XX

Show Details: Report will display Transaction Details

Description: Reason Vendor Name

Account Code: Fund: 199 Func: 11 Obj: 6119 Subj: XX Org: XXX Prog: X XX X XX X

Retrieve Reset

	Fund	Func	Obj	Subj	Org	Prog				
	199	11	6119	00	001	1	99	0	00	HS SECRETARY
										** Beginning
										0.00 0.00 0.00 0.00
GJ	999999	09-01-2020	09	OPENING ENTRY						-36,032.00 0.00
GJ	REVACC	09-01-2020	10	AUG PAYROLL ACCRU DISTRIBUTI						-1,611.22
GJ	P60910	09-25-2020	09	SEP - PAYROLL DISTRIBUTION						3,002.62
GJ	P61010	10-22-2020	10	OCT - PAYROLL DISTRIBUTION						3,212.62
GJ	P61108	11-07-2020	11	NOV - PAYROLL DISTRIBUTION						3,002.62
GJ	P61108	11-18-2020	11	NOV - PAYROLL DISTRIBUTION						3,002.62
										** Ending
										-36,032.00 0.00 10,609.26 -25,422.74

- Type 199.11.6119 or 199.00.2161 in the **Fund, Function, and Object Code** fields.
- Leave all other fields masked (Xs).
- Click **Retrieve**.
- Verify that **“August Payroll Accru”** (or an LEA-defined description) with a negative expenditure amount was posted (typically in September 2020).

If TxEIS is not used for the EOY payroll accruals (days worked in August), there is not a computer journal entry. Verify that the manual JV entries were posted for EOY payroll accruals.

If a reversal entry is not displayed, use the **Human Resources > Payroll Processing > EOY Payroll Accruals** page to complete the process.

Payroll Processing > EOY Payroll Accruals

SessionTimer: 29 min and 51 sec

Accrual Table | Decrement | Run Calculations | Accrual Reports | Create General Journal | Interface to Finance | Post To Master | Reversal for Non-Accrual | Mass Delete

File ID: C

Accounting Period: Post to Current Acct Period: 10 Post to Next Acct Period: 11

Reversal Interface Transaction Date: 09-01-2020

JV Number: REVACC

Create Reversals

Select	Frequency	Calculation Date	Create GJ Date	Interface Date	Posted Date	Reversal Interface Date
<input type="checkbox"/>	F	08-31-2020	08-20-2020	08-20-2020	09-01-2020	

2

Clear Next Year Tables

Clear next year tables.

Human Resources > Next Year > Copy CYR Tables to NYR > Clear Next Year Tables

Log on to the current pay frequency.

If the next year payroll process was used last year and those records were not cleared, use the following steps to clear the records.

- **Do not** select the **Clear EOY Accrual Data Only** and **Clear NY Payroll Budget Only** fields. The EOY accrual data and next year payroll budget data is cleared whether or not these fields are selected.
- Move all of the tables from the left side to the right side of the page.
- Click **Execute**. All existing employees are deleted from the next year payroll files and a clean work file exists allowing you to begin building next year data.

Note: This process clears all tables in all pay frequencies; therefore, it is only necessary to perform this process in one pay frequency even if the LEA has multiple pay frequencies.

This process can be verified by logging on to the next year pay frequency and running the [Human Resources > Reports > HR Reports > Personnel Reports > HRS1000 - Roster of Personnel Report](#) for active and inactive employees. The report results should be blank.

3

Copy Current Year Tables

Copy current year tables.

Human Resources > Next Year > Copy CYR Tables to NYR > Copy Current Year Tables

Log on to the current pay frequency.

Next Year > Copy CYR Tables to NYR SessionTimer: 59 min and 40 sec

Clear Next Year Tables **Copy Current Year Tables**

Title		
Accrual Calendar	<input checked="" type="checkbox"/>	...
Extra Duty Pay	<input checked="" type="checkbox"/>	...
Hourly / Daily Salary	<input checked="" type="checkbox"/>	...
Job Code	<input checked="" type="checkbox"/>	...
Local Annual Salary	<input checked="" type="checkbox"/>	...
Midpoint Salary	<input checked="" type="checkbox"/>	...
School Calendar	<input checked="" type="checkbox"/>	...
State Minimum Salary	<input checked="" type="checkbox"/>	...
Substitute Salary	<input checked="" type="checkbox"/>	...
Workers' Compensation Rates	<input checked="" type="checkbox"/>	...

Execute **Select All Tables**

Click **Select All Tables** to select all current year tables to be copied to the next year. It is recommended that all tables are copied so that you have immediate access to any selected table.

- This process copies tables for all next year pay frequencies except the school calendar table, regardless of the frequency to which you are logged on.
- To copy the school calendar, log on to each pay frequency to do so. The school calendar is not copied, only the calendar code and the calendar description are copied.

Click **Execute**. A separate preview report is displayed for each selected table.

Click **Process** on each report page to copy the table. Or, click **Cancel** not to copy the table. A message is displayed indicating that the tables were successfully copied. Click **OK**.

4

Copy Current Year Staff To Next Year

Copy current year staff to next year.

Human Resources > Next Year > Copy CYR Staff to NYR

Log on to the current pay frequency.

Copy the employees from the current year payroll to the next year payroll. If you have multiple pay frequencies, complete this task in all pay frequencies.

Reminder: Be aware of where the budget is in terms of the fiscal year.

What happens?

A complete copy of the current employee record is moved to the next year. Employees can be inactivated or activated when copying to the next year and those with termination dates can also be included in the copy process. When copying, you can change the fiscal year in distribution as well as the remaining deductions in the employee master record. If you update the number of remaining deductions, all deductions on the employee Deduction tab are updated to the designated default value. Be careful of deductions that should not be activated for the next year and those that the number of remaining deductions should be different from the default value and perform any necessary cleanup. The **Human Resources > Utilities > Mass Update** tabs can be used to modify remaining payments for deduction codes.

If this process is performed multiple times for employees without deleting their NYR records, the system either updates or inserts distribution records from CYR to NYR and cleanup may be necessary.

Employees in the next year must be active to extract distribution information to Budget. If you do not activate employees when copying to next year, you can activate them when you perform a mass update.

- Under **Pay Status**, select **Active** to copy only active employees.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Options**:
 - It is recommended to select **Include Employees with Termination Date** to copy active employees with a termination date on the [Human Resources > Maintenance > Staff Job/Pay Info > Employment Info](#) tab.
 - **Do not** select **Inactivate Records when Creating NY Tables**.
 - In the **Next Year's Funding Code** field, type the fiscal year to be used when updating the distribution account code fiscal year in the next year employee master distribution records. Leave blank if the distribution account code fiscal year in the next year employee master distribution record is to remain the same as the current fiscal year until the next year budget is in place. Then, use the Mass Update utility to update to the correct fiscal year.
 - It is recommended that the **Number of Remaining Deductions** is left blank to copy deductions with the number of remaining deductions as they exist in the current pay frequency.
- Click **Execute**. You are prompted to create a [backup](#). If the process is successful, a preview report is displayed. Review the employee list to verify that the correct data was copied to the next year records. Also, review the total employee count at the end of the report.
- Click **Process** to accept the changes and continue. A message is displayed indicating that the process was successfully completed. In addition, a list of the database record tables that were copied is displayed. Click **OK**.
- Click **Cancel** to return to the Copy CYR Staff to NYR page without making the changes.

Prior to continuing this process, log on to the next year pay frequency.

5

Verify Staff Data

Verify staff data.

Run the following reports to assist in verifying data.

- [Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing](#) - This report can be used to verify deduction information. Run the report with only the **Include Reports** parameter set to **Deductions**. A user created report can be created to only include deduction information. It can be sorted by deduction code and remaining payments.
- [Human Resources > Reports > HR Reports > Personnel Reports > HRS1000 - Roster of Personnel](#) - If an employee was not copied over to the next year, run the Copy CYR Staff to NYR utility again for only the single employee.
- [Human Resources > Reports > HR Reports > Personnel Reports > HRS1100 - Employee Verification Report](#) - This report provides detailed employee data such as employment dates, salary, address, and other information for reference or to verify recent input and processing.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6000 - Account Code Comparison](#) - This report is used to verify the distribution codes from the master distribution page against the account codes in Budget. If there are account codes displayed on this report, these codes should be set up in Budget or changed. The desired outcome of this report is a report heading with no account codes listed.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6550 - Employee Extra Duty Report](#) - The report lists all employees with extra duty codes on the Pay Info tab. The report can be sorted by name, campus, or extra duty code. The **Include Distribution Account Codes** parameter includes S-type distributions for the selected employees.

6

Update School Calendar

Update school calendar.

[Human Resources > Tables > Workday Calendars > School Calendar](#)

Only complete this step if it is applicable to your LEA. **All LEA's must create a TR calendar.**

Note: Do not create accrual calendars at this time. The accrual calendars should be created in the current year payfrequency.

Selected Calendar Code: TR TRS

September 2021	October 2021	November 2021	December 2021
Su Mo Tu We Th Fr Sa 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
January 2022	February 2022	March 2022	April 2022
Su Mo Tu We Th Fr Sa 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
May 2022	June 2022	July 2022	August 2022
Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Legend

- Begin Date
- Begin Date In Service
- Workday
- In Service
- Holiday
- Bad Weather Day
- Weekend
- End Date In Service
- Not Applicable
- [Undo Selection](#)

Workdays By Month

September	22
October	21
November	22
December	23
January	21
February	20
March	23
April	21
May	22
June	22
July	21
August	23

Day Count

Workday	261
In Service	0
Holiday	0
Weekend	104
Not Applicable	0
Bad Weather Day	0
Total Days:	365

Create school calendars to accommodate the varied number of days employees work at the LEA. The calendar is used on the [Human Resources > Maintenance > Staff Job/Pay Data > Job Info](#) tab to calculate the **Number of Days Employed** field if the beginning and ending contract dates are entered.

Create calendars with the same calendar code as the current year to avoid having to update the calendar code on the individual employee's job info record.

☐ Select the calendar to be updated.

Tables > Workday Calendars

Save

School Calendar Accrual Calendar Copy School Calendar Delete School Calendar

Calendar Code	Calendar Description	Actual Workdays
1		
10		
11		
12		
13		
15		
17		
2		
3		
4		
5		
6		
7		
8		
9		
AJ		
BB		
BL		
DM		
DS		
GA		
JM		
JR		
KW		

Print

+ Add

Start Year (YYYY) 2021
Start Month (MM) 08

Set Calendar

Start Year	Type the starting calendar year in the YYYY format.
Start Month	Type the starting calendar month in the MM format (e.g., 07 for July).

Click **Set Calendar** to display the calendar. The calendar is rearranged to begin with the entered starting month.

Selected Calendar Code: TC 187 Staff

Month	Workdays
August	12
September	21
October	21
November	17
December	16
January	21
February	20
March	18
April	21
May	20
June	0
July	0

Workday	187
In Service	0
Holiday	18
Weekend	80
Not Applicable	80
Bad Weather Day	0
Total Days	365

It is recommended that you build the calendar with the greatest number of days worked first, and then use the Copy School Calendar tab to build other calendars by making modifications to the original.

IMPORTANT:

- For TRS purposes, a TR calendar with a calendar code of **TR** must be created for all available workdays beginning 09/01. (**TIP:** If 9/01 falls on a weekend day, select the first working day of the month.) The TR calendar is used to populate the number of days worked on the RP report for employees who are not assigned to a school calendar
- For TRS purposes, all TRS retirees' contract days must begin on the first day of the month and end on the last day of the month.

7

Update Staff Credentials

[Update staff credentials.](#)

Human Resources > Tables > Credential

Update the following tabs to reflect any employee credential changes. This information is used to maintain teacher credentials.



This task is usually done by the personnel department and does not affect salary calculations.

The following credential tabs are shared between the current year and next year records; therefore, changes to the current year records are effective in the next year records, and vice versa.

- [Human Resources > Tables > Credential > Major/Minor](#)
- [Human Resources > Tables > Credential > College Code](#)
- [Human Resources > Tables > Credential > Certification Type](#)
- [Human Resources > Tables > Credential > Specialty Area](#)
- [Human Resources > Tables > Credential > Teaching Specialization](#)

8

Update Next Year Salary Table

[Update next year salarytable.](#)

Human Resources > Tables > Salaries

Update the following next year salary tables to reflect any changes to the salary schedules (anticipated or known). These tables are not shared between the current year and next year records.



- [Human Resources > Tables > Salaries > Local Annual](#)
- [Human Resources > Tables > Salaries > Hourly/Daily](#)
- [Human Resources > Tables > Salaries > Extra Duty](#)
- [Human Resources > Tables > Salaries > State Min](#)
- [Human Resources > Tables > Salaries > Substitute](#)
- [Human Resources > Tables > Salaries > Midpoint](#)
- [Human Resources > Tables > Tax/Deductions > Workers' Comp](#)

9

Update TRS Rates Table

Update TRS rates table.

Human Resources > Tables > Tax/Deductions > TRS Rates

Update the TRS rates.

Caution: Be sure to retrieve the 2022 school year data prior to updating this tab.

IMPORTANT: Be sure to visit the TRS website:

https://www.trs.texas.gov/Pages/re_contribution_rates.aspx to obtain the updated rates for the next school year, and then return to this table to update the new rates.

Tables > Tax/Deductions SessionTimer: 29 min and 11 sec

Save

New (2022) TRS Rates Record populated based on TRS Year 2021 values; click Save to retain the record.

School Year: **Retrieve** **Delete**

Exemptions | Income Tax | FICA Tax | Unemployment | **TRS Rates** | 457 Def Comp | Workers' Comp | Deduction Cd

Delete **Print**

TRS Rate:	<input type="text" value="7.70%"/>	
TRS Fee:	<input type="text" value="0.00"/>	
TRS Insurance:	<input type="text" value="0.65%"/>	Employer Paid: <input type="checkbox"/>
District Rate:	<input type="text" value="7.500%"/>	
TRS Care Rate:	<input type="text" value="1.25%"/>	
TRS Care Emplr Contrib:	<input type="text" value="0.75%"/>	
TRS IRS Salary Cap:	<input type="text" value="285,000.00"/>	
TRS Non-OASDI Rate:	<input type="text" value="1.600%"/>	

To create a new TRS rates record, type the new year (2022) and click **Retrieve**. A message is displayed indicating that the new record is populated based on the prior year (2021) TRS rates record, click **Save** to retain the record.

Complete the applicable fields. This information is used when performing calculations and extracts to Budget.

10

Update Deduction Code Table

Update deduction code table.

Human Resources > Tables > Tax/Deductions > Deduction Code

Tables > Tax/Deductions SessionTimer: 29 min and 39 sec

Save

Exemptions | Income Tax | FICA Tax | Unemployment | TRS Rates | 457 Def Comp | Workers' Comp | Deduction Cd

Retrieve Print

Delete	Deduction Code	Long Description	Abbrev Cd	Short Description	Deduct Chk	Wire	Vendor Name/Sort Key	Vendor Nbr	Extract Ded Cd	W2
	021	ACTIVE CARE SELECT	AC TRS He	TRS AC SELECT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NORTH 87 AUTO PARTS & REPAIR	26449	00ACSK	
	001	ADDITIONAL WITHHOLDING TAX	WH Additi	ADD-WITHHOLDING	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
	028	AETNA LIFE INSURANCE COMPAN	HI Health	Aetna Long Term	<input checked="" type="checkbox"/>	<input type="checkbox"/>	YOUNG AUDIENCES OF S.E. TEXAS	10115		
	004	AIMS DUES	M1 Miscel	AIMS DUES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	THIRTYSEVEN4, LLC	27900		
	026	AMERICAN FIDELITY LIFE	HI Health	AMERICAN FID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WRIGHT & MCGILL	10244		

Update the deduction codes. The Deduction Code tab is shared between the current year and next year records; therefore, changes to the current year records are effective in the next year records, and vice versa.

11

Update Job Code Table

Update job code table.

[Human Resources > Tables > Job/Contract > Job Codes](#)

Update the job codes.

Tables > Job/Contract SessionTimer: 58 min and 11 sec

Save

Job Codes Contract Class Contract Term Contract Year Extract ID Termination Reason

Retrieve Print

Delete	Job Code	Job Description	EEOC Code	Account Code	Salary Concept	Increase Pay Step	ESP Salary Class Code
	0001	ACADEMIC RESOURCE TEACH	06 Scnd classrm teach ▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼
	0002	CULINARY ARTS TEACHER	07 Other classrm teach ▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼
	0003	MULTI AGE 2-4	▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼
	0004	LIBRARIAN	10 Librarian, AV staff ▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	L Librarian ▼
	0005	WORLD LANGUAGE	05 Elem classrm teach ▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼
	0006	TECHNOLOGY AS A SL DIRECT	▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼
	0007	SPEECH	06 Scnd classrm teach ▼	--	D Use hourly/daily rate table ▼	<input checked="" type="checkbox"/>	T Class teacher ▼

1 / 22 Add

- Select the appropriate **Salary Concept** for each job.
- (*Optional*) Update the distribution **Account Code** fields.

The job codes table is not shared between the current year and next year records.

Reminder: In the **FTE Hrs** field, type the appropriate full-time hours for each job code. Effective September 2017, the scheduled weekly hours are used by TRS reporting.

12

Review TRS Requirements

TRS Information

TRS Reporting Requirements

Ensure that the necessary District HR options and employee indicators are present for TRS reporting. All employees including substitutes, part-time, and students must be reported each month regardless of their TRS status. TRS reporting requires the following fields to be updated for all employees. You can use the Mass Update utility to update all of the fields except the **Hire** and **Rehire Date** fields.

- **ALL** employees are reported.
- Retired employees are only reported on the ER record.
- A contract **Begin** and **End Date** is required for **ALL** employees.

Required Information	Human Resources Page
The FTE Hours (full-time equivalent) is required for the ED record if 30 hours or more.	Human Resources > Tables > Job/Contract > Job Codes
The Days Worked or scheduled is required for the RP record. This data is retrieved from either the school calendar or TR calendar.	Human Resources > Tables > Workday Calendars
The Employment Type is required for the ED record.	Human Resources > Maintenance > Staff Job/Pay Data > Employment Info
The TRS Status (TRS membership eligibility flag) is required for the ED record.	Human Resources > Maintenance > Staff Job/Pay Data > Pay Info
A TRS Member Pos (position) Code is required for all employees (including substitutes).	Human Resources > Maintenance > Staff Job/Pay Data > Job Info
The Wkly Hrs. Sched (hours scheduled) is required for the RP record.	
The Retiree Employment Type is required for the ER record.	Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

13

Update Staff Data

[Update staff data.](#)

Human Resources > Utilities > Mass Update

Use the Mass Update utility to update employee data in preparation for the new school year. This utility allows you to quickly and easily mass change data resulting in minimal manual changes to individual employee records with less possibility manual entry errors.

Important: To avoid entering data in an incorrect pay frequency, be mindful of the pay frequency to which you are logged on as you may be changing back and forth between the current year and next year pay frequencies for several months.

Human Resources > Utilities > Mass Update > Deductions

This tab is used to update deductions for a number of employees at a single time. Deduction data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Deductions tab allows users to add, change, and delete deduction codes as well as alter the number of remaining payments and the existing dollar amounts associated with the deductions. Mass deduction updates are very useful at the beginning of the year when many employees are being added to insurance programs. Once deductions are added using this tab, they are reflected in the individual deduction records.

The screenshot displays the 'Utilities > Mass Update' web application interface. At the top, it shows 'Session Timer: 59 min and 28 sec', 'HRS3400', and 'County/District #: 015112'. The main area is divided into several sections:

- Parameters:** Includes fields for 'Pay Status' (radio buttons for Active, Inactive, Both), 'Primary Campus' (dropdown), 'Payoff Date' (calendar), 'Pay Type' (dropdown), 'Pay Campus' (dropdown), 'Frequency' (dropdown), 'Job Code' (dropdown), 'Contract Begin Date' (calendar), 'Salary Concept' (dropdown), 'Accrual Code' (dropdown), 'Contract End Date' (calendar), 'Extract ID' (dropdown), 'Pay Grade' (dropdown), 'Contract Months' (text), and 'Employee Nbr' (text). A 'Reset' button is located to the right.
- Navigation Tabs:** 'Deductions', 'Leave', 'Employee', 'Extra Duty', 'Job Code', and 'Salary Calculation'. 'Deductions' is currently selected.
- Method:** A list of update methods with radio buttons:
 - Change Existing Code and Amounts to Another
 - Change Remaining Deduction Payments
 - Change Dollar Amount on Existing Code
 - Add Deduction Code to Employees
 - Delete Deduction Code from Employees
 - Delete Deduction Code with Zero Remaining Payments from Employees
 - Change Existing Code only to Another
- Change Deduction Info:** Includes 'If Deduction Code' (text), 'New Code' (text), 'Net Amount' (text), 'Remaining Payments' (text), and 'Empir Contrib' (text). Below this are two sections:
 - Refund:** Radio buttons for 'No Update', 'Update All Records to N', and 'Update All Records to Y'.
 - Cafe 125:** Radio buttons for 'No Update', 'Update All Records to N', and 'Update All Records to Y'.
- An 'Execute' button is located at the bottom right of the main form area.

Under **Parameters**, select the employees whose deduction data is to be changed.

TIP: Prior to processing a mass update, capture a screen shot of the used parameters for future reference.

Under **Method**, select the type of deduction change to be implemented.

Click **Execute**. A preview report is displayed. [Review the report.](#)

Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page. If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.

[Human Resources > Utilities > Mass Update > Leave](#)

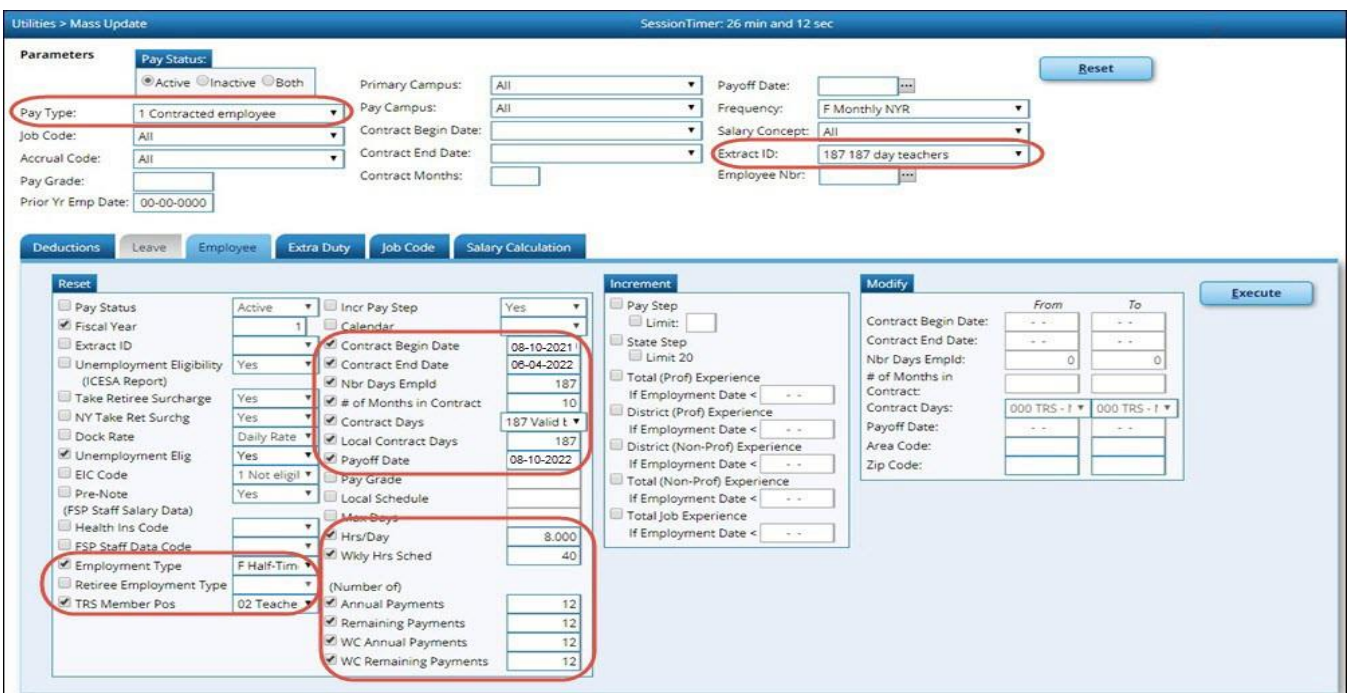
This tab is disabled as leave is only updated in the current year.

[Human Resources > Utilities > Mass Update > Employee](#)

This tab is used to update employee data for a number of employees at a single time. Employee data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Employee tab allows users to reset, increment, or modify employee data. The data that may be altered includes the number of annual payments, number of days employed, contract begin date, and number of years of local experience. Once employee data is altered using this page, changes are reflected in the individual employee records.

Under **Parameters**, select the employees whose employee data is to be changed.

TIP: Prior to processing a mass update, capture a screen shot of the used parameters for future reference.



Note: Never use the **Reset**, **Increment**, and **Modify** options at the same time.

Example of **Reset**:

Utilities > Mass Update SessionTimer: 21 min and 51 sec

Parameters

Pay Status: Active Inactive Both

Primary Campus: All Payoff Date:

Pay Type: All Pay Campus: All Frequency: F Monthly NYR

Job Code: All **Contract Begin Date: 08-12-2020** Salary Concept: All

Accrual Code: All Contract End Date: Extract ID:

Pay Grade: Contract Months: Employee Nbr:

Prior Yr Emp Date: 00-00-0000 **Reset**

Reset **Execute**

<input type="checkbox"/> Pay Status	Active	<input type="checkbox"/> Incr Pay Step	Yes
<input type="checkbox"/> Fiscal Year	1	<input type="checkbox"/> Calendar	
<input type="checkbox"/> Extract ID		<input checked="" type="checkbox"/> Contract Begin Date	08-10-2021
<input type="checkbox"/> Unemployment Eligibility (ICESA Report)		<input checked="" type="checkbox"/> Contract End Date	08-04-2022
<input type="checkbox"/> Take Retiree Surcharge		Nbr Days Empld	
<input type="checkbox"/> NY Take Ret Surchg		# of Months in Contract	
<input type="checkbox"/> Dock Rate	Daily Rate	Contract Days	000 TRS - 1
<input type="checkbox"/> Unemployment Elig	1 Not elig	Local Contract Days	0
<input type="checkbox"/> EIC Code	Yes	<input checked="" type="checkbox"/> Payoff Date	08-10-2022
<input type="checkbox"/> Pre-Note (FSP Staff Salary Data)		Pay Grade	
<input type="checkbox"/> Health Ins Code		Local Schedule	
<input type="checkbox"/> FSP Staff Data Code		Max Days	
<input type="checkbox"/> Employment Type		Hrs/Day	0.000
<input type="checkbox"/> Retiree Employment Type		Wkly Hrs Sched	0
<input type="checkbox"/> TRS Member Pos		(Number of)	
		<input checked="" type="checkbox"/> Annual Payments	0
		<input type="checkbox"/> Remaining Payments	0
		<input type="checkbox"/> WC Annual Payments	0
		<input type="checkbox"/> WC Remaining Payments	0

Increment

Pay Step Limit:

State Step Limit: 20

Total (Prof) Experience

If Employment Date < -- --

District (Prof) Experience

If Employment Date < -- --

District (Non-Prof) Experience

If Employment Date < -- --

Total (Non-Prof) Experience

If Employment Date < -- --

Total Job Experience

If Employment Date < -- --

Modify

	From	To
Contract Begin Date:	--	--
Contract End Date:	--	--
Nbr Days Empld:	0	0
# of Months in Contract:		
Contract Days:	000 TRS - 1	000 TRS - 1
Payoff Date:	--	--
Area Code:		
Zip Code:		

Utilities > Mass Update SessionTimer: 20 min and 45 sec

Parameters

Pay Status: Active Inactive Both

Primary Campus: All Payoff Date:

Pay Type: All Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date: Salary Concept: All

Accrual Code: All Contract End Date: Extract ID:

Pay Grade: Contract Months: Employee Nbr:

Prior Yr Emp Date: 00-00-0000 **Reset**

Reset **Execute**

<input type="checkbox"/> Pay Status	Active	<input type="checkbox"/> Incr Pay Step	Yes
<input type="checkbox"/> Fiscal Year	1	<input type="checkbox"/> Calendar	
<input type="checkbox"/> Extract ID		<input type="checkbox"/> Contract Begin Date	
<input type="checkbox"/> Unemployment Eligibility (ICESA Report)		<input type="checkbox"/> Contract End Date	
<input type="checkbox"/> Take Retiree Surcharge		Nbr Days Empld	
<input type="checkbox"/> NY Take Ret Surchg		# of Months in Contract	
<input type="checkbox"/> Dock Rate	Daily Rate	Contract Days	000 TRS - 1
<input type="checkbox"/> Unemployment Elig	1 Not elig	Local Contract Days	0
<input type="checkbox"/> EIC Code	Yes	Payoff Date	
<input type="checkbox"/> Pre-Note (FSP Staff Salary Data)		Pay Grade	
<input type="checkbox"/> Health Ins Code		Local Schedule	
<input type="checkbox"/> FSP Staff Data Code		Max Days	
<input type="checkbox"/> Employment Type		Hrs/Day	0.000
<input type="checkbox"/> Retiree Employment Type		Wkly Hrs Sched	0
<input type="checkbox"/> TRS Member Pos		(Number of)	
		<input checked="" type="checkbox"/> Annual Payments	12
		<input checked="" type="checkbox"/> Remaining Payments	12
		<input checked="" type="checkbox"/> WC Annual Payments	12
		<input checked="" type="checkbox"/> WC Remaining Payments	12

Increment

Pay Step Limit:

State Step Limit: 20

Total (Prof) Experience

If Employment Date < -- --

District (Prof) Experience

If Employment Date < -- --

District (Non-Prof) Experience

If Employment Date < -- --

Total (Non-Prof) Experience

If Employment Date < -- --

Total Job Experience

If Employment Date < -- --

Modify

	From	To
Contract Begin Date:	--	--
Contract End Date:	--	--
Nbr Days Empld:	0	0
# of Months in Contract:		
Contract Days:	000 TRS - 1	000 TRS - 1
Payoff Date:	--	--
Area Code:		
Zip Code:		

Example of **Increment**:

Utilities > Mass Update SessionTimer: 18 min and 58 sec

Parameters

Pay Status: Active Inactive Both

Pay Type: 1 Contracted employee

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date: 01-08-2021

Primary Campus: All

Pay Campus: All

Contract Begin Date:

Contract End Date:

Contract Months:

Payoff Date:

Frequency: F Monthly NYR

Salary Concept: All

Extract ID:

Employee Nbr:

Increment

Pay Step

Limit:

State Step

Limit 20

Total (Prof) Experience:

Modify

Contract Begin Date: From To

Contract End Date: -- -- -- --

Nbr Days Empld: 0 0

of Months in Contract:

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date: 08-10-2021 08-10-2022

Execute

Example of **Modify**:

Utilities > Mass Update SessionTimer: 13 min and 42 sec

Parameters

Pay Status: Active Inactive Both

Pay Type: All

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date:

Primary Campus: All

Pay Campus: All

Contract Begin Date:

Contract End Date:

Contract Months:

Payoff Date:

Frequency: F Monthly NYR

Salary Concept: All

Extract ID:

Employee Nbr:

Modify

Contract Begin Date: 08-12-2020 08-10-2021

Contract End Date: 08-02-2021 08-04-2022

Nbr Days Empld: 0 0

of Months in Contract:

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date: 08-10-2021 08-10-2022

Execute

❑ The first run is to update the contract dates, but not increment any pay steps. Complete only the fields under **Modify**.

- Under **Modify**, complete the applicable fields.
- The **Area Code** and **Zip Code** is updated in both the current year and next year.
- In the **Prior Year Employment Date** field, type today's date in the MMDDYYYY format and select the pay frequency. This changes the contract dates for all employees, regardless of the date they came to work for the LEA.

Note: The **Prior Year Employment Date** field uses the date in the **Latest Re-Employ Date** field on the [Human Resources > Maintenance > Staff Job/Pay Data > Employment Info](#). If this date is blank or contains zeros, it uses the date in the **Original Emp. Date** field. If no date exists in either field, the employee is not updated.

- The second run is for pay purposes to update all employees with one year of earned experience.
 - In the **Prior Year Employment Date** field, enter a date in January (i.e., 01-XX-XXXX) that represents the maximum number of days required for the employee to have earned a pay step advance (e.g., 90 days).
 - This run does not include any employees hired after that date because they should not receive a step advance for pay purposes but consult your LEA's policy.
 - Under **Increment**, complete only the **Pay Step** and **State Step** fields.

Caution: Do not update any experience fields at this time. Experience should not be updated until after the service records have been extracted and saved. Once the service records are complete, you can update records in either the current year or the next year. It is important not to forget this step as it must be completed prior to PEIMS reporting in October.

- Click **Execute**. A preview report is displayed. [Review the report](#).
- Click **Process**. You are prompted to create a [backup](#). A message is displayed indicating that the process was successfully completed. Or, click **Cancel** to return to the Mass Update page.
- Use the Extra Duty tab to change employee extra duty assignments that display on the Pay Info tab.
- Run the [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6550 - Employee Extra Duty Report](#) by code before performing the extra duty mass updates. Once you update your changes, run the HRS6550 report in the NYR frequency to verify that the changes are correct.

Human Resources > Utilities > Mass Update > Extra Duty

This tab is used to update extra duty assignments for a number of employees at a single time. Extra duty data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Extra Duty tab allows users to add, change, and delete extra duty codes as well as alter the existing dollar amounts associated with the extra duty assignments. Once extra duty assignments are changed or deleted using this page, modifications are reflected in the individual extra duty records.

- Under **Parameters**, select the employees and records to be copied to the current year.
TIP: Prior to processing a mass update, capture a screen shot of the used parameters for future reference.
- Under **Method**, select the extra duty changes to be implemented.
- Click **Populate Extra Duty Code Description** to update the **Amount** field when a different extra duty code is selected.
- Click **Execute**. A preview report is displayed. [Review the report](#).
- Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page. If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.

Human Resources > Utilities > Mass Update > Job Code

This tab is used to update job code data for a number of employees at a single time. Job code data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Job Code tab allows users to modify job code data. Once job code data is altered using this page, changes are reflected in the individual records.

Use the Job Code tab to change employee job assignments that display on the Job Info tab. This change modifies the Job Info tab and the Distribution tab.

Note: If accruals are associated with job codes, make changes with caution and verify.

Under **Parameters**, select the employees whose job code data is to be changed.
TIP: Prior to processing a mass update, capture a screen shot of the used parameters for future reference.

Under **Change Job Code to Another Code**:

If Job Code	Click to select the job code to be changed.
Change To	Click to select the new job code.

Click **Execute**. A preview report is displayed. [Review the report](#).

Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page. If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.

14

Update Staff Demographic Data

Update staff demographic data.

Human Resources > Maintenance > Staff Demo > Demographic

Maintenance > Staff Demo SessionTimer: 59 min and 44 sec HRS3000 County

Save

Employee: 000004 : ABDIN IL AARON ORVILLE Retrieve Directory Add Emp Documents

Demographic Information Credentials Verification Insurance Service Record Responsibility

Staff ID/SSN: 058-56-9973 Texas Unique Staff ID: 7425284325 Last Change: 06-09-2014

Name

Legal: AARON ORVILLE ABDIN 3 II Maiden Name

Former: Title First Middle Last Generation

Addresses

Mailing: Number 938 Street/P.O. Box ALABASTER Apt City Alamo City State TX TEXAS Zip 47036 Country

Alternate: Address Country Delivery Name

Supplemental: Address Country Delivery Name

Sex: M Male Citizenship: DL State: TX TEXAS

DOB: 08-23-1948 Marital Stat: M Married Deceased: DL Expir Date: 00-00-0000 Other Language:

Ethnicity: Hispanic/Latino

Race (check all that apply; must select at least one)

American Indian Alaskan Native Native Hawaiian Pacific Islander

Asian White

Black African American

❑ Add new employees or update existing employees. The Staff Demo tabs are shared between the current year and next year records; therefore, changes to the current year records are effective in the next year records and vice versa.

Remember: All employees must have a TX Unique ID number. The TX Unique ID number can be extracted in the next year pay frequency on the [Human Resources > Utilities > Texas Unique Staff ID Interface > Staff ID Export](#) tab.

Utilities > Texas Unique Staff ID Interface

Staff ID Export Staff ID Import

School Year:

From: 2020 To: 2021 Execute

❑ Save the file and forward it to your District PEIMS Coordinator to be processed.

Utilities > Texas Unique Staff ID Interface

Staff ID Export Staff ID Import

Import File:

File Name: Browse... Execute

15

Update Staff Job/Pay Data

[Update staff job paydata.](#)

Human Resources > Maintenance > Staff Job/Pay Data

Add or update employee information on the following tabs:

- **Employment Info** - This tab is shared between the current year and next year records; therefore, changes to the current year records are effective in the next year records and vice versa.

Select the **NY Take Retiree Surcharge** field to include the retiree surcharge when the Extract Payroll to Budget process is performed.

Note: If service records have not been created, do not update data such as the **Percent Day Employed**, **Years Experience** and **Grade(s) Taught** fields for existing employees.

- **Pay Info** - This tab is not shared between the current year and next year records.

Make the necessary changes to the extra duty supplements and verify the changes using the [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6400 - Salary Verification Report](#).

Updates to the extra duty table do not automatically update the extra duty data on the Pay Info tab.

Click **Yes** to update both the current year and next year records.

Click **No** to update only the next year records.

This also occurs when changes are made in the current year records and next year records exist.

- **Job Info** - This tab is not shared between the current year and next year records.

For new employees, a generic job is displayed on the Job Info tab and this job can be modified as needed. The following fields must be completed prior to saving:

Primary Campus
% Assigned ○
of Days Empld
TRS Member Position ○
Begin Date End Date ○

Notes:

- The following data should be entered before performing automatic salary calculations:
 - Pay Grade**
 - Step** ○
 - Sched** (if applicable)
 - Max Days** ∞
 - State Step** ∞
 - State Min Days**
 - TRS Year** - This field should be selected if the employee has a nonstandard contract.
 - Accrual Codes** ○
 - W/C Code** ○
 - State Minimum Salary % Assigned** - Verify this field for employees whose **# of Days Employed** field does not match the **State Min Days** field on the Job Info tab for the primary job and adjust accordingly. ∞
 - Distribution information ○
- **Distributions** - This tab is not shared between the current year and next year records.

If a contract amount is not entered on the Job Info tab, no amount or percentage is required before saving the record. If the account code does not exist in Budget, it cannot be selected from the account code drop-down list.

A distribution code must exist for each job to be updated with salary calculations. When calculations are performed, amounts are updated based on the existing distribution percentages.

Verify **Expense 373** designations for applicable employees who are subject to Stat Min calculations.

- **Deductions** - This tab is not shared between the current year and next year records.

Exception: When changes to an existing employee's deduction information is saved, a message is displayed asking if the current year records should be updated.

If the **Remain Pymts** field is set to 99, it will not decrement each time a payroll is processed.

Be sure to add an **Emplr Contrib** (Employer Contribution) amount for vacancies/new employees to avoid an understated budget.

Update the garnishment amounts as there may be changes to the salary amounts for the upcoming year and the garnishment amounts are based on salary percentages.

Click **Yes** to update both the current year and next year records.

Click **No** to update only the next year records.

This also occurs when changes are made in the current year records and next year records exist.

Perform an export prior to performing salary calculations.

16

Perform Salary Calculations

Perform salary calculations.

[Human Resources](#) > [Utilities](#) > [Mass Update](#) > [Salary Calculation](#)

Perform salary calculations if you are using salary tables. This tab is used to automatically calculate salaries for active employees (pay status 1) that are linked to the salary tables. You can quickly calculate salaries and automatically update important fields in the employee record.

The screenshot displays the 'Salary Calculation' tab within the 'Mass Update' utility. The interface includes a 'Parameters' section with the following fields:

- Pay Status:** Radio buttons for Active (selected), Inactive, and Both.
- Primary Campus:** All (dropdown)
- Payoff Date:** (calendar icon)
- Pay Type:** All (dropdown)
- Pay Campus:** All (dropdown)
- Frequency:** F Monthly NYR (dropdown)
- Job Code:** All (dropdown)
- Contract Begin Date:** (calendar icon)
- Salary Concept:** A Use annual salary table (dropdown)
- Contract End Date:** (calendar icon)
- Extract ID:** (dropdown)
- Contract Months:** (input field)
- Employee Nbr:** (input field)
- Pay Grade:** (input field)
- Prior Yr Emp Date:** 00-00-0000 (input field)

Below the parameters is a 'Type of Calculation' section with radio buttons for 'Salary' (selected) and 'State Minimum Only'. There is also a checkbox for 'Apply Percent of Day Employed to Salary Amount'. An 'Execute' button is located to the right of the 'Type of Calculation' section. A 'Reset' button is located in the top right corner of the parameters section.

Salary calculations should not be done multiple times for an employee using the midpoint table. It is highly recommended that you perform an export prior to running calculations using the midpoint table. This allows you to restore data from the backup and run the midpoint calculations again if necessary.

A report provides a listing of errors prior to completing the process. Clear all errors and perform the calculations as often as necessary. All errors should be cleared before continuing. If employee errors are encountered, the listed employees are not updated. If the employee has multiple jobs and one of those jobs does not have all or part of the salary table information selected on the Job Info tab, errors are displayed and updates are not processed. When calculations are performed on one concept and the employee has multiple concepts, errors are displayed if any of the other concepts are incomplete and updates are not processed.

The system automatically uses the new contract amount and distributes it among the employees' master distribution records based on the existing percentage. The new amount displays regardless of the option selected in the **Distributions Built by Amt %** field on the [Human Resources > Tables > District HR Options](#). Manual modifications may be necessary to employees' salary distribution codes, amounts, and/or percentages after performing salary calculations.

□ The following fields must be completed on the Job Info tab for pay type 1, 2, and 3 employees:

- **Pay Grade**
- **Step**
- **Max Days** - If the **Max Days** field is not populated, salary calculations will only process if the field is not linked to the **Annual Salary Concept**. If the field is linked to the **Annual Salary Concept**, this field must be populated to run salary calculations.
- **Begin Date**
- **End Date**
- The **OVTM Rate** field and the **# of Days Employed** field are calculated when the **OVTM** flag and **Calendar Code** fields are populated on the Job Info tab.
- If the **State Step** field is populated on the Job Info tab, the amount from the state minimum salary table is entered in the **State Min Salary** field.

Caution: The **State Min Salary** field is calculated by multiplying either the **State Min Days** or the **# of Days Employed** by the appropriate daily rate from the state minimum salary table for all pay types that have state min. The **% Assigned** field in the **State Info** section on the Job Info tab is also considered in this calculation. The **State Min Salary** field should be checked closely and manually updated, if necessary, after performing salary calculations.

- If an employee has an extra duty account type G on the Pay Info tab, it is added to the **Total** field for the contract on the primary job.
- If an employee has a business allowance account type T or B amount with remaining payments and/or an extra duty account type S amount with remaining payments and distribution codes totaling 100% exist in the master distribution record for the account type, the appropriate distribution records are updated.
- If the **# of Annual Payments** and **Contract Total** fields are greater than zero, the **Pay Rate** field is calculated by dividing the **Contract Total** by the **# of Annual Payments**. If the **# of Annual Payments** and/or **Contract Total** is not populated, the **Pay Rate** is not calculated.
- If the **# of Days Empld** and **Contract Total** fields are greater than zero, the **Daily Rate of Pay** field is calculated by dividing the **Contract Total** by the **# of Days Employed**. If the **# of Days Employed** and/or **Contract Total** is not populated, the **Daily Rate of Pay** is not calculated.

- Other fields that are updated on the Job Info tab are:

Accrual Rate - If the accrual code exists and the **# of Days Empld** and **Contract Total** fields are greater than zero, the **Accrual Rate** field is calculated by dividing the **Contract Total** by the **# of Days Employed**. The amount is rounded to three decimal places.

Contract Total and Balance

- - Pay type 3 employee salaries are calculated based on the hourly/daily or midpoint salary table information. If the local annual table is used, errors are displayed when performing mass salary calculations.
 - When using the hourly/daily salary schedule, calculations are based on the **Hrs Per Day** field x the **Amount** field from the salary table x the **# of Days Employed** field from the Job Info tab. The resulting amount populates the **Estimated Annual Salary** field on the Employment Info tab.
 - When using the midpoint salary schedule, calculations are based on the **Midpoint** field x the **Amount** field from the salary table x the **# of Days Employed** field from the Job Info tab. The resulting amount populates the **Estimated Annual Salary** field on the Employment Info tab.
 - If the **# of Days Employed** field is not populated, the **Estimated Annual Salary** field is not calculated.
- If not performing mass salary calculations for hourly employees, manually update the amount in the **Estimated Annual Salary** field on the Employment Info tab or update the **Contract Total** on the Job Info tab and distribution information. This salary information is extracted to Budget and used for PEIMS reporting.
- On the Job Info tab, there is a **Calculate** button, salary calculations can be done for an individual rather than doing salary calculations in Mass Update for groups of employees. The **Calculate** button on the Job Info tab will render the same results as doing the Mass Update salary calculations.
- The **Automatically Compute** fields on the District HR Options page assists in manually updating employees. By using this feature, the payrate, daily rate, dock rate, accrual rate, and overtime rate can all be automatically calculated when the annual contract and days employed are entered on the Job Info tab.

Midpoint Calculation Examples

Pay Grade	Pay Type	Minimum	Maximum	Midpoint	Max Percent Pay Increase	Mid Percent Pay Increase	Max Inc/Dec Amount	Mid Inc/Dec Amount	Hour
AP1	1 Contracted employee	234.680	337.710	286.195	0.000 x	2.000	0.000	5.724	0.00
AP2	1 Contracted employee	251.092	361.365	306.228	0.000	2.000	0.000	6.125	0.00
AP3	1 Contracted employee	268.673	386.655	327.664	0.000	2.000	0.000	6.553	0.00
AP4	1 Contracted employee	287.480	413.697	350.588	0.000	2.000	0.000	7.012	0.00
AP5	1 Contracted employee	307.630	442.667	375.149	0.000	2.000	0.000	7.503	0.00
AP6	1 Contracted employee	329.241	473.681	401.461	0.000	2.000	0.000	8.029	0.00
AX1	2 Non-contracted emp	68.000	95.920	81.960	0.000	2.000	0.000	1.639	0.00
AX2	2 Non-contracted emp	79.600	112.320	95.960	0.000	2.000	0.000	1.919	0.00
AX3	2 Non-contracted emp	93.200	131.280	112.240	0.000	2.000	0.000	2.245	0.00
AX4	2 Non-contracted emp	105.600	148.800	127.200	0.000	2.000	0.000	2.544	0.00
AX5	2 Non-contracted emp	116.080	163.760	139.920	0.000	2.000	0.000	2.798	0.00
AX6	2 Non-contracted emp	140.536	198.176	169.356	0.000	2.000	0.000	3.387	0.00
AX7	2 Non-contracted emp	154.616	217.888	186.252	0.000	2.000	0.000	3.725	0.00
BX3	2 Non-contracted emp	46.600	65.640	56.120	0.000	2.000	0.000	1.122	0.00
CT1	2 Non-contracted emp	86.184	127.248	106.716	0.000	2.000	0.000	2.134	0.00
CT2	2 Non-contracted emp	92.232	136.136	114.184	0.000	2.000	0.000	2.284	0.00
CT3	2 Non-contracted emp	95.088	149.424	122.256	0.000	2.000	0.000	2.445	0.00
CT4	2 Non-contracted emp	101.724	159.896	130.810	0.000	2.000	0.000	2.616	0.00
CT5	2 Non-contracted emp	108.864	171.160	140.012	0.000	2.000	0.000	2.800	0.00
CT6	2 Non-contracted emp	116.424	183.128	149.776	0.000	2.000	0.000	2.996	0.00
HX1	3 Hourly employee	8.500	11.990	10.245	0.000	2.000	0.000	0.205	0.00
HX2	3 Hourly employee	9.950	14.040	11.995	0.000	2.000	0.000	0.240	0.00

Calculate

Process Cancel

17

Verify Salary Calculations

Verify salary calculations.

Select and run the applicable reports to verify the salary calculations:

- [Human Resources > Reports > HR Reports > Personnel Reports > HRS1000 - Roster of Personnel](#) - This report provides a list of employees by pay campus. This is a good report to give to principals and directors to verify employees assigned to their campus or department without sharing pay information.
- [Human Resources > Reports > HR Reports > Personnel Reports > HRS1250 - Employee Data Listing](#) - This report provides detailed information about demographics, salary, TRS/Calendar/School YTD, leave, deductions, and account distribution codes.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6050 - Contract Balance Variance Report](#) - This report will print exceptions for contracted (pay type 1) and non-contract (pay type 2) employees when the contract balance does not equal the **Pay Rate** times the **# of Remaining Payments**.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6150 - Employee Payroll Listing](#) - This report provides detailed information about pay status, campus code, pay type, marital status, number exemptions, months/days in contract, annual contract amount, monthly/daily rate of pay, and the first distribution line from the master distribution record.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6400 - Salary Verification Report](#) - This report can be used to verify that next year salary calculations have been correctly run before copying next year to current year.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6000 - Account Code Comparison](#) - The report is an error listing. For current year, the report identifies account codes in the payroll process and verifies that these account codes exist in Finance. If a code entered in the payroll process is not located in the chart of accounts, the account number, social security number, and name of the employee are printed on the report. For next year, the report identifies account codes on the Budget Data page of the Budget application.
- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6550 - Employee Extra Duty Report](#) - The report lists all employees with extra duty codes on the Pay Info tab. Users can sort the listing by name, campus, or extra duty code. The **Include Distribution Account Codes** parameter allows the user to include S-type distributions for those employees selected.

- [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6650 - CYR/NRY Salary Comparison](#) - This report provides a salary comparison for employees with pay type 1 and pay type 2 jobs. The report indicates employee information and job information for both current year and next year to allow easy comparison of salaries between the data.
- [Human Resources > Reports > User Created Reports > HR Report](#) - Run user created reports as defined by the user.

18

Verify Data Using Addendum Sheets

[Use Addendum sheets to verify data.](#)

Use the Addendum created when using the Payroll Simulation utility to verify data as it lists all jobs separately, as well as business allowances, extra duty, etc.

Only active employees (pay status 1) are considered in this process. The Addendum sheets can be used to explain pay to employees and as a contract support document for applicable employees to sign & date.

[Human Resources > Reports > HR Reports > Payroll Information Reports > Employee Salary Information](#)

- If this report is generated from the next year payroll files, leave information is excluded.
- If this report is generated from the current year payroll files, leave information is included.

[Human Resources > Utilities > Payroll Simulation > Addendum](#)

19

Perform "Test Payroll"

Perform a "test payroll".

[Human Resources](#) > [Utilities](#) > [Pre-Edit Payroll Data](#)

Run this utility to perform what could be called a "test payroll" for employees that meet the selected parameters.

It is a partial run of calculations and it does not use transmittals or leave files. This utility can be run in either the current year or next year.

Note: This utility should be run prior to creating your budget extract or before copying the next year to the current year. This utility creates a report that displays errors on each employee. The report is sorted by employee number order and provides error messages that are easy to understand so that corrections can be made prior to extracting for budget. Remember, if changes are made to the employee records, calculations need to be run again.

20

Extract Payroll Account Codes

Extract payroll account codes.

Human Resources > Next Year > Interface NY Payroll to NY Budget > Extract Payroll Account Codes

Before interfacing the payroll to the budget, verify the following:

- Are all new employees in the system?
- Are all employees active that are to be extracted to budget?
- Are all Staff/Job Pay data tabs updated and complete for new and existing employees?
- Does the next fiscal year in distributions match the budget fiscal year?
- Are all deductions updated?
- Are all extra duty stipends updated?
- Since the next year payroll budget calculations use the s-type extra duty remaining amounts, verify that these amounts have been updated.

Run this utility to extract payroll account codes for specific active (pay status 1) employees who are in the next year payroll. The resulting extract is used to transfer this information to the budget. This process can be repeated as often as necessary.

Next Year > Interface NY Payroll to NY Budget SessionTimer: 59 min and 37 sec

Extract Payroll Account Codes **Extract Reports** Interface to Budget

Next Year Frequency
 D - Biweekly E - Semimonthly F - Monthly Exclude TRS On-Behalf Calculations TRS On Behalf Expenditure Account: XXXXX6144XXXXXXX000000000000 Run

Pay Campus: Primary Campus: Retrieve Hourly employee deductions remaining payments: Frequency D: 26 E: 24 F: 12

Enter the Starting Accounting Period for the Finance Fiscal Year: 9

Select	Emp Nbr	Frequency	Last Name	First Name
<input type="checkbox"/>	000809	F A	R	CC IELO
<input type="checkbox"/>	000848	F A	R	CF
<input type="checkbox"/>	000723	F A	R	ES
<input type="checkbox"/>	000707	F A	S	BE AIN
<input type="checkbox"/>	000553	F A		LU
<input type="checkbox"/>	000835	F A	IDER LOVE	TR
<input type="checkbox"/>	000708	F A	ZA	LA N
<input type="checkbox"/>	000709	F A	ZA	RA AEL
<input type="checkbox"/>	000804	F A	DO	MI DA
<input type="checkbox"/>	000730	F A	A	OF
<input type="checkbox"/>	000686	F A	A	KA EEN
<input type="checkbox"/>	000277	F A	BECK	RE CA
<input type="checkbox"/>	000727	F B		DI
<input type="checkbox"/>	000822	F B		PA IA
<input type="checkbox"/>	000842	F B	DOWSKI	AL
<input type="checkbox"/>	000333	F B		SH Y
<input type="checkbox"/>	000814	F B	R	NA N
<input type="checkbox"/>	000803	F B		JAI
<input type="checkbox"/>	000836	F B	N	KA
<input type="checkbox"/>	000858	F B	ND	KIF RLY
<input type="checkbox"/>	000621	F B	ND	NI
<input type="checkbox"/>	000854	F B		FR IE

No Rows

If applicable, select **Exclude TRS On-Behalf Calculations**.

If you interface the on-behalf expenditures (6144) into Budget, manually input the revenue for the on-behalf account codes (5831).

Note: If a pay type 3 employee has an amount in the **Estimated Annual Salary** field on the Employee Info tab, an amount in the **Contract Total** field on the Job Info tab, and salary account codes on the Distribution tab, the amount in the **Estimated Annual Salary** field and the salary account codes from the Distribution tab are extracted to Budget.

21

Verify The Extract Reports Tab

Verify the Extract Reports tab.

Human Resources > Next Year > Interface NY Payroll to NY Budget > Extract Reports

Human Resources > Reports > HR Reports > NY Interface Budget Reports

Use the reports to verify the accuracy and validity of the employees, accounts, and amounts.

Next Year > Interface NY Payroll to NY Budget

Extract Payroll Account Codes Extract Reports Interface to Budget

Next Year Payroll Extract Reports

Gen Rpt	Report	Sort Options	Sort Order
<input type="checkbox"/>	Next Year Payroll Employee Distribution	Alpha (A), Pay Campus (C), Primary Campus (P)	A
<input type="checkbox"/>	Next Year Payroll Account Distribution	Fund (F), Organization (O)	F

Generate Reports Select ALL Reports

Pay special attention to the employee count to verify that the correct number of employees are extracted and match the count on the Next Year Payroll Employee Distribution Report.

Date Run:		Next Year Payroll Employee Distribution										Program: HRS9960								
Cnty Dist:		ISD										Page: 1 of 76								
Fr	Emp Nbr	Employee Name	Typ	W/C	373	Gn	Pct %	Amount	FICA	Medicare	Insurance	TEA	Wk Comp	TRS On	Unemp	TRS	TRS Care	Dep Care		
		Account Code							(-----6141-----)	(--6142--)	(--6142--)	(--6142--)	(--6143--)	(--6144--)	(-6145-)	(-----6146-----)	(--6148--)			
					Ann / HSA	Def Comp	Emplr Misc													
					(-----6149-----)															
F	000006	AMY, ALEXAM						Pay Cmp:101	FICA: M	TRS St: 1	Unemp: Y	Day %: 100.00	Exp Dist: 23	Exp Tot: 23	Deg: 1					
	199-11-6119.00-101-223000	G A Y	100.000	56,365.00	.00	756.00	3,058.08	.00	240.97	4,747.24	19.81	1,415.98	.00	.00						
	Cafe Amt: 4,276.68	66,603.08	Employee Totals:	56,365.00	.00	756.00	3,058.08	.00	240.97	4,747.24	19.81	1,415.98	.00	.00						
Prim	Job Code	Pct Asgn	Prim Camp	Typ	Contr Amt	Std Pay	Begin Dt	State Min Days	Mo Contr	Py Grd	W/C Cd	Accue Cd								
Extra Duty Cd				Wholly Sep	St Min Salary	Dly Pay Rate	Local	Nbr Days Empld	Ann Pymts	Step	W/C Pymts	Accue Rate								
Y	0101 - ELEMENTARY TEACHER	100.00	101	1	56,365.00	4,697.08	08-12-2019	187	10	TEA	A	A								
					54,540.00	301.417	1,825.00	187	12	23	8	301.417								
					.00															
	199-11-6119.07-101-223000	S A Y	100.000	666.68	.00	8.94	.00	.00	2.83	56.15	.23	16.74	.00	.00						
	Cafe Amt: .00	751.57	Employee Totals:	666.68	.00	8.94	.00	.00	2.83	56.15	.23	16.74	.00	.00						
					.00	.00	.00	.00												
Prim	Job Code	Pct Asgn	Prim Camp	Typ	Contr Amt	Std Pay	Begin Dt	State Min Days	Mo Contr	Py Grd	W/C Cd	Accue Cd								
Extra Duty Cd				Wholly Sep	St Min Salary	Dly Pay Rate	Local	Nbr Days Empld	Ann Pymts	Step	W/C Pymts	Accue Rate								
N	XTRA - EXTRA DUTY	.00	001	1	666.68	.00		0	0											
	60 - PROF LNGVTY 10 +				.00	.000	.00	187	8		1	.000								
			Type: S		.00															
					.00															
Ded	Emp Amt	Pnt	Cal	Empr	Fac	TEA F	Ded	Emp Amt	Pnt	Cal	Empr	Fac	TEA F	Ded	Emp Amt	Pnt	Cal	Empr	Fac	TEA F
001	100.00	99	N	.00	1	1	005	36.00	1	N	.00	1	1	013	.00	99	N	.84	1	1
021	302.00	99	Y	254.00	1	1	054	100.00	99	N	.00	1	1	112	18.93	99	Y	.00	1	1
121	27.83	99	Y	.00	1	1	122	7.63	99	Y	.00	1	1	142	23.54	99	N	.00	1	1
144	1.70	99	N	.00	1	1	151	20.25	99	N	.00	1	1	169	9.00	99	N	.00	1	1
171	9.00	99	N	.00	1	1	181	39.00	99	N	.00	1	1							

Date Run:		Next Year Payroll Account Distribution										Program: HRS9970		
Cnty Dist:		ISD										Page: 1 of 51		
Sort Order: Fund														
Account Code											Amount			
199-11-6119.00-001-211000	Account Not Found													
F Barnes, AMY											000016	40,777.20		
F BOUDREAUX, BILLY											000049	56,635.00		
F BURKS, BRITTAN B											000077	53,212.00		
F COLE, CHRISTAL M											000108	29,450.20		
F DAUGHERTY, DARCIE NELSON											000143	56,203.00		
F EAST, LISA											000604	27,454.82		
F GIBSON, JACIE IOLA											000215	45,680.00		
F KELLY, KATHERINE D											000291	56,365.00		
F LISLE, KRISTY J											000329	56,635.00		
F Nguyen, MANDY LINN											000387	22,465.44		
F NICHOLS, MARANDA E											000388	52,434.00		
F SHOEMAKE, RAMONA MARK											000457	33,960.45		
F SUIRE, SANDRA											000491	38,182.00		
F SUMMERS, SANDRA C											000494	6,110.00		
F THAMES, SHARON A											000510	35,680.05		
F Welch, TAMELA MARIE											000553	52,434.00		
F WINDHAM, Vy RYAN											000589	38,000.00		
F WOFFORD, WENDY NICOLE											000593	33,060.00		
F WOMACK, WHITNEY DENE											000594	33,060.00		
											Total:	767,798.16		
199-11-6119.00-001-222000	Account Not Found													
F Barnes, AMY											000016	15,857.80		
F BROWN, BRENDA											000066	39,361.33		
F COLE, CHRISTAL M											000108	15,857.80		
F SCHWARTZ, PAMELA L											000441	51,681.00		
F SHOEMAKE, RAMONA MARK											000457	5,074.55		
F SUMMERS, SANDRA C											000494	42,770.00		
F WILSON, VICKI LINNEA											000585	23,560.00		
F Wilson, VIRGINIA ALAN											000587	38,000.00		
F WOMACK, WHITNEY DENE											000594	4,940.00		
											Total:	237,102.48		

22

(If necessary) Perform Another Extract And Interface To Budget

(If necessary) Perform another extract and interface to Budget.

If changes are made to employee salary information, employees are added, employees are inactivated, or termination dates are entered, perform another extract and interface those new changes to Budget.

Note: Updates to the budget will replace the existing amounts for those account distribution codes that match the accounts in Budget. If an account distribution code no longer exists in payroll when interfaced to Budget (after previous interfaces), the account code is not changed or removed in Budget. You must manually modify the budget for those account codes. This also applies to those amounts in the budget that have been manually modified after the initial interface from payroll. If the budget account is not locked and the change needs to be retained for budget purposes, all manual modifications need to be made again.

23

Interface To Budget

Interface to Budget.

Human Resources > Next Year > Interface NY Payroll to NY Budget > Interface to Budget

If all of the information is correct:

Under **Next Year Payroll**, select one of the following columns to be updated in Budget:

- **Next Yr Recommend**
- **Next Yr Approved**

Click **Interface**. This process can be repeated as often as necessary until the Board approves the budget. For each run, the **Next Year Budget** amount is replaced. If the budget lock flag is set on an account, the budget amount is not replaced.

If distributions or employees are changed after the first calculations are interfaced, you may be required to log back on to the current pay frequency and use the [Next Year > Copy CYR Tables to NYR > Clear Next Year Tables](#) tab with the **Clear NY Payroll Budget Only** option selected to recalculate and interface the new changes back to the next year frequency.

Contact your regional ESC consultant if you need additional assistance.

24

Perform Staff Benefits Update

Perform staff benefits update.

Perform the employee benefits update and import process.

The screenshot displays the 'Employee Benefits Interface' with the 'Import Annual File' tab selected. The 'Year Selection' section has 'Next Year' selected. The 'Active Employees Only' checkbox is checked. There is an 'Execute' button and a 'Browse...' button for the 'Deduction Import Path'.

[Human Resources > Utilities > Employee Benefits Interface > Import Annual File](#)

Import Annual File - HRS8500

Human Resources > Utilities > Employee Benefits Interface > Import Annual File

This tab is used to import a text file to create, change, and delete employee deduction records for those deductions that have the **Extract Ded Cd** field populated on the Tables > Tax/Deductions > Deduction Cd tab. Only those records are influenced by the import. If the deduction record that has an extract deduction code does not exist on the imported file but exists on the employee's master deduction record, it is deleted from the master deduction record. It is important that the vendor provide an import that includes all active deductions for employees that have a deduction with an extract deduction code and not just those that are being changed or added.

The import file should contain monthly amounts. The import process makes adjustments based on the pay frequency as follows:

- Pay frequency 4 = amount x 12/26
- Pay frequency 5 = amount/2
- Pay frequency 6 = amount

To import changes more frequently, go to Import Changes Only - HRS8500.

[Import Annual Changes File Layout](#)

Import employee benefits:

Under **Year Selection**, select from the following:

- **Current Year**
- **Next Year**

Active Employees Only	Select to base the selected pay frequency for the records on the highest pay frequency in which the employee is active.
Deduction Import Path	Click Browse , and then select the folder to which a copy of the deductions is to be imported. Click OK to select the folder or Cancel to close the dialog box without processing.

Click **Execute** to start the import process.

- In the application dialog box, verify the path of the import, and click **Yes** to continue the import or **No** to return to the import dialog box.
- In the archive password dialog box, type a password for this imported file. Click **OK**.
- The files are imported, and a message is displayed indicating the import process completed successfully. Click **OK**.

If any errors are encountered during the import process, an error report is displayed. If there are no errors, the error report is not displayed.

If no errors are encountered during the import process, or you clicked **Continue** from the error report, the import report is displayed.

[Review the report.](#)

Click **Continue** to proceed.

If you click **Process**, a message is displayed indicating that the data was imported. Click **OK**.



Back Cover