



Texas Skyward User Group Conference

# Payroll Tips and Tricks

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# Payroll Tips and Tricks



**This session will help you identify options within the Payroll module that may speed-up or streamline your payroll processing steps.**

- Deduction/Benefit Default Setup
- Unpaid Time Off Import (Create Dock Pay)
- Comp Time Payout
- Assignment Export/Payroll Import
- Options for customizing Employee Profile
- Viewing Employee Access information from Employee Profile

## Deduction/Benefit Default Setup

Employee Type Codes (859)

Views: General Filters: \*Skyward Default

Code	Short Description	Long Description	Count	Faculty	TRS Group
CAWKK	CAFETERIA EMP	CAFETERIA EMPLOYEE	b1	3	
CONSL	CONSULTANT	CONSULTANT SUPPORT SERVICE	0		1
COORD	COORDINATOR	COORDINATOR	2		1
COUNS	COUNSELOR	SCHOOL COUNSELOR	20		5

Expand All Collapse All Modify Details (displaying 3 of 3) View Printable Details

▼ Default Deductions Edit Deductions

Code	Level
OMC	1
OTC	1
OTRS	1
OWH	1

▼ Default Benefits Edit Benefits

Code	Level
OMC	1
OTC	1
GRPLF	2

▼ Time Off Default Detail Edit Time Off Default

Code	Group	Units
JURY	9	Days
LOCAL	1	Days
PROLV	9	Days
STPFR	2	Days

20 records displayed Code:

## Unpaid Time Off Import (Create Dock Pay)

HR\PA\CP\PW\PW - 2070 - Payroll Worksheet 0-DOCKS - Employee Key Sequence

Selection Parameters Last Used Parameters ACA Date Range: 10/10/2015 to: 10/31/2015 Edit

Worksheet Entries

Name Key	Employee	Factor/Hours
AARONARL000	Aaronson	1.00
ABEITHER001	Abeitas	0.00
ABILAREN001	Abilascr,	0.00
ABILAREN001	Abilascr,	0.00
ABLERMIL001	Ablerscr,	0.00
ACKERJOH001	Ackerley	1.00

\* = record has been imported

Worksheet Totals: Pay: 120.00

Employee: Aaronson, A  
Employee Type: COORD

Updateable Information  
Pay Record: Contract  
Pay Code: CON

Account Number: 199 E 34 6125 34 999 0 23 000 Edit

Pay Rate: 10,000.0000 Factor/Hours: 1.00 Hours Worked: 0.00 Total Pay: 10,000.00  
ACA Hours: 120.00 PR2: 0.00

Pay record pay code - used to determine what pay record to pull ded/bens from. SkyDoc

HR\PA\CP\PW\PW - 2070 - Unpaid Time Off Import

This process will read through each employee's unpaid time off transactions that do not have an import date. A worksheet entry will be built for each unpaid time off transaction that matches the criteria. The employee must have a pay record with the Hourly or Daily pay code selected below. The worksheet record's account and rate information will be pulled from this pay record.

A verification report will print prior to building the Worksheet records. The selection parameters from the Worksheet Entry screen are used for this process.

Time Off Date Range: 01/01/1900 to: 06/16/2016

Hourly Pay Code [ ] [ ]  
Daily Pay Code [ ] [ ]

REQUIRED: Time Off Transaction Range Low Date SkyDoc

Run Close

# Comp Time Payout

HR\PA\CP\PW\PW - 2070 - Payroll Worksheet 0-DOCKS - Employee Key Sequence

Selection Parameters Last Used Parameters ACA Date Range: 10/10/2015 to: 10/31/2015

* Name Key	Employee	Factor/Hours
AARONARL000	Aaronson	1.00
ABEITHER001	Abeitas	0.00
ABILAREN001	Abilascr,	0.00
ABILAREN001	Abilascr,	0.00
ABLERMIL001	Ablerscr,	0.00
ACKERJOH001	Ackerley	1.00

\* = record has been imported

**Worksheet Totals:** Pay: 120.00

Employee: Aaronson,  
Employee Type: COORD

**Updateable Information**  
Pay Record  
Pay Code: CON

Account Number: 199 E 34 6

Pay Rate: 10,000.0000 Factor/Hours: 1.00 Hours Worked: 0.00 Total Pay: 10,000.00  
ACA Hours: 120.00 PR2: 0.00

Pay record pay code - used to determine what pay record to pull ded/bens from.

**HR\PA\CP\PW\PW - 2070 - Comp Time Payout**

This process will read through each employees time off transactions with the selected time off code and calculate the balance. If the time off code has a positive balance, this process will:

- 1) Build a worksheet record for that employee. The worksheet records account and rate information will be pulled from the employees existing pay record.
- 2) Build a Time Off record for that employee. The Time Off record will have the Date = the cutoff date, Type = 'Allocated', and the Amount = Negative Remaining Balance.

A verification report will print prior to building the Worksheet and Time Off records. The selection parameters from the worksheet screen are ignored during this process.

Time Off Code: COMPENSATION TIME OFF COMP

Time Off cutoff date: 06/16/2016 (Time off transactions less than or equal to this date will be used to calculate the time off balance)

Pay Code: COMP STIPEND COMSC

(Each employee must have an existing pay record with this pay code, if not an exception will print)

REQUIRED: Pay Code to payout the Comp Time to.



# Payroll Import

http://broker189/scripts/cg

Logi... Assi... A... x Load... Web... Imp... Sky... Load...

### Assignment Export/Payroll Import Parameters (102)

**Import Parameters**

Plan: 09-10 EMPL MGMT PLAN 8/30/09

\* Selection Parameters: Default Parameters x

Select Non Contract Pay Codes to not Include in Merge Criteria ?

**Pay Record Factor Options for 'Rate Type' pay codes**

- Set to zero
- Pull from assignment (Total Hours divided by frequency)
- Keep factor value from current pay record (0 if does not exist)

Note: Non-Rate type pay code factors are automatically set to 1.

**Contract Active Flag Options**

- Set to active and inactivate all other contracts with the same pay code
- Set to inactive

**Deduction Calculation Options ?**

Maximum Matrix Step: 0.00 Calculation Percent: 0.0000

**Payroll Import Options Based on Assignment Code Setup**

- Create Time Off setup information

**Paid Date Import Options**

- Do not import Paid Start/Stop Dates
- Import Paid Start/Stop Dates into pay control file
- Import Paid Start/Stop Dates into pay record

**Pay Record Creation Options ?**

- Always create new pay record
- If pay record exists update with assignment information, otherwise create a new pay record
- Keep account distribution for Hourly, Overtime, Daily

Set pay levels for dedcs/bens to be attached to new pay record

**Contract Records Creation Options**

If contract record does not exist contract record is created.

If contract record does exist:

- Update with assignment information
- Print exception

**Retirement Hours Options**

- Zero out retirement hours
- Keep retirement hours from current pay record (if does not exist 0)
- Get retirement hours from assignment (calendar hrs/frequency)

Asterisk (\*) denotes a required field

Report Run Back





## Viewing Employee Access information from Employee Profile

Employee Access - Employee Tab (244)

Employee: Aaronson Arletha J

Employee Info

Employee Name:  Conf:

Former Name:  No

House Name:  No

Phone 1: (512) 666-4444 Ext:  Conf:

Phone 2: (555) 555-5555 Ext:  No

Phone 3: (555) 123-4564 Ext:  No

Email: arletha.aaronson@done.com

2nd Email:  Type:

3rd Email:  Type:

4th Email:  Type:

Demographic

Personnel

Payroll

Time Off Status

Insurance

Sub Transactions

Food Service

Account Information

Payments

Purchases

Employee Letters

Ethnicity:  Hispanic/Latino?

Federal Race:  1-American Indian or Alaskan Native

2-Asian

3-Black or African American

4-Native Hawaiian or Other Pacific Islander

5-White





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**THANK YOU FOR ATTENDING!**

