



Texas Skyward User Group Conference

Payroll Tips and Tricks

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Payroll Tips and Tricks



Discover if there are options within the Payroll Module that will allow you to speed-up, or streamline, your payroll processing steps. Maybe you have some useful tips that you'd like to share as well!

- Deduction/Benefit Default Setup
- Unpaid Time Off Import (Create Dock Pay)
- Adding Deduction/Benefit Codes within the Payroll
- Retrieving a previous ACH file
- Assignment Export/Payroll Import

Deduction/Benefit Default Setup

Employee Type Codes (534)

Views: General Filters: *Skyward Default

Code	Short Description	Long Description	Count
▼ Admin	Administration	Administration	0

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

▼ **Default Deductions** Edit Deductions

Code	Level
401K	3
FEDT	1
FICAM	1
FICAR	1

▼ **Default Benefits** Edit Benefits

Code	Level
FICAM	1
FICAR	1
RETIR	1
TAXLF	2

▼ **Time Off Default Detail** Edit Time Off Default

Code	Group	Units
ADMIN	9	Hours
Per	2	Days
SICK	1	Days
VAC	3	Days

▶ APrin	Asst Principal	Assistant Principal	0
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Unpaid Time Off Import (Create Dock Pay)

HR\PA\CP\PW\PW - 2070 - Payroll Worksheet
TIME OFF UNPAID - Employee Key Sequence
✕

Selection Parameters | Last Used Parameters
ACA Date Range: 03/08/2018 to 03/08/2018 ✎ Edit

Worksheet Entries					
* Name Key	Employee Name	Pay Code	Account Number	Pay Rate	Factor/Hours

* = record has been imported

Worksheet Totals: Pay: 0.0000 Factor/Hours: 0.00 Total Pay: 0.00

Employee: Employee Type: Pay Record: Account Number:

Pay Code:

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 10/15/2018
Run Close

Hourly Pay Code: DOCK
Daily Pay Code: DOCK

This button will run the process. SkyDoc

OK Cancel

 Select to change ACA Date range values. SkyDoc

Adding Deduction/Benefit Codes within the Payroll

HR\PA\CP\SE - 745 - Change/Select Pay Record

Name: BRADYTH0000 Brady, Thomas (Cafeteria Work) Info OK Cancel Period End Date: 06/06/2018

HR\PA\CP\SE - 745 - Number of Times to Pay Deductions/Benefits Info OK Cancel

Name: BRADYTH0000 Brady, Thomas (Cafeteria Work) Info OK Cancel

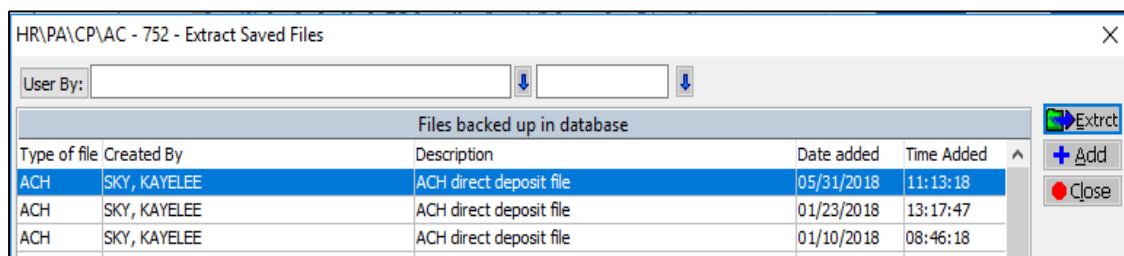
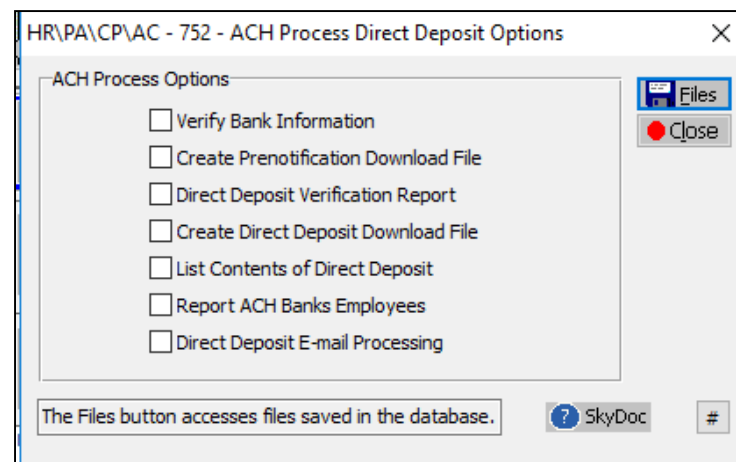
Available Control File Deds		Selected Transaction Deductions				
Code	Description	Code	Description	Type	Amount/Rate	Times
1TC	TRS-CARE	SVIS	VISION INS	Amt	20.0000	1
1TR	RETIREMENT	ATPE	ATPE	Amt	13.0000	1
CHLDS	CHILD SUPPORT	FEDT	FED TAX	Clc	0.0000	1
		FICAM	FICA-M	Clc	1.4500	1
		FICAR	FICA R	Clc	6.2000	1
		FLEX2	FLEX2	Amt	10.0000	1
		GARN	GARN	Pct	20.0000	1
		HEAL	HEALTH INS	Amt	195.0000	1

Code: 1TC View Active Setup Codes

View Control File Codes

Account Number for Highlighted Code: 863 L 00 2155 00 000 0 00 000

Retrieving a previous ACH File








Assignment Export Process (Part 1 of 2 for Assignment Export/Payroll Import)

Assignment Export - WH\AD\EM\AE - 11683 - 05.17.10.00.12 - Google Chrome

broker6:92/scripts/cgiip.exe/WService=11212web/hemmgedit140.w?isPopup=true

Assignment Export (216)

Plan Parameters

Plan:

* [Selection Parameters:](#) ▼

[Select Non Contract Pay Codes to not Include in Merge Criteria](#) ?

Process All Assignments

Process all assignments regardless of export date value

Process only assignments without an export date

Asterisk (*) denotes a required field

Payroll Import Process (Part 2 of 2 for Assignment Export/Payroll Import)

Assignment Export/Payroll Import Parameters - WH\AD\EM\AE - 11683 - 05.17.10.00.12 - Google Chrome

broker6:92/scripts/cgiip.exe/WService=11212web/rappjjoblst436.w?isPopup=true

Assignment Export/Payroll Import Parameters (218)

Import Parameters

Plan:

* Selection Parameters:

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

Report

Run

Back

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.

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

Contract Active Flag Options

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

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 Additional Pay Codes

[Set pay levels for dedts/bens to be attached to new pay record](#)

Deduction Calculation Options ?

Maximum Matrix Step: Calculation Percent:

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

Payroll Import Options Based on Assignment Code Setup

Create Time Off setup information

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



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THANK YOU FOR ATTENDING!

