

Texas Skyward User Group Conference

Payroll -New Fiscal Year

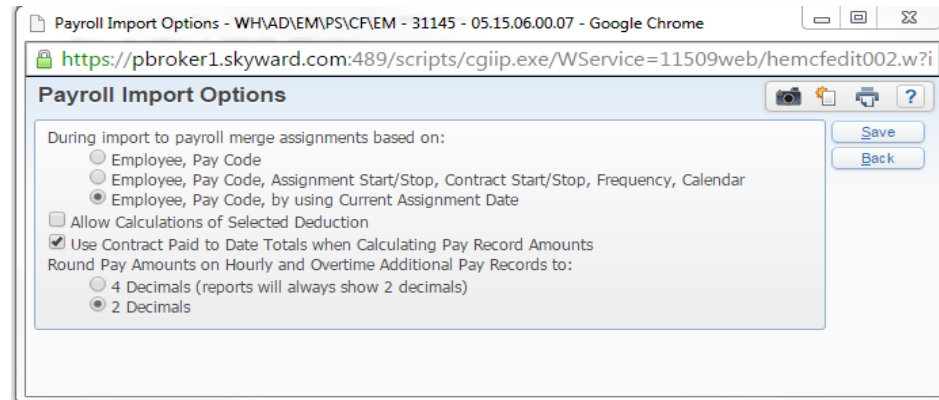
Tonya Lott



This session will discuss methods for minimizing the stress of updating Payroll for the new fiscal year.

- When exporting employee management assignments to payroll pay records, ensure that the Employee Management export configuration is right for your district.
- Set your matrix option to export per-diem amounts or contract amounts or use the option to divide pay among remaining checks.
- Set configuration option show payroll calculation exceptions when pay records have outlived their contracts. Use Pay Record Audit utility to mass remove outlived pay records.
- Use Payroll Mass Processing to update new deduction and benefit amounts.
- Run Deduction/Benefit Audit -report shows deductions/benefits not attached to a pay record.
- Run Pay Record Audit -Report allows you to inactivate/delete pay records from previous years.

Set the Payroll Import Options in the Employee Management configuration screen. The third option (shown) is the most comprehensive.



When mid year step increases are given, pay record amounts will depend on how the matrix is setup

Matrix Master Entry - WH\AD\EM\PS\CO\MM - 25704 - 05.15.06.00.07 - Google Chrome

<https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/hemmged>

Matrix Master Entry

* Matrix Code: 0304A

* Matrix Description: Teacher

Matrix Type

- Contract
- Extended Contract
- Hourly
- Extra Duty
- Daily

District Base: \$32,500.00

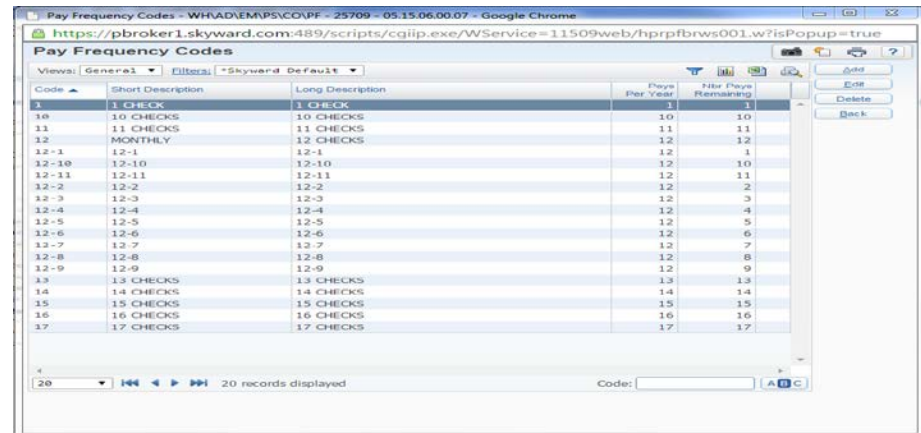
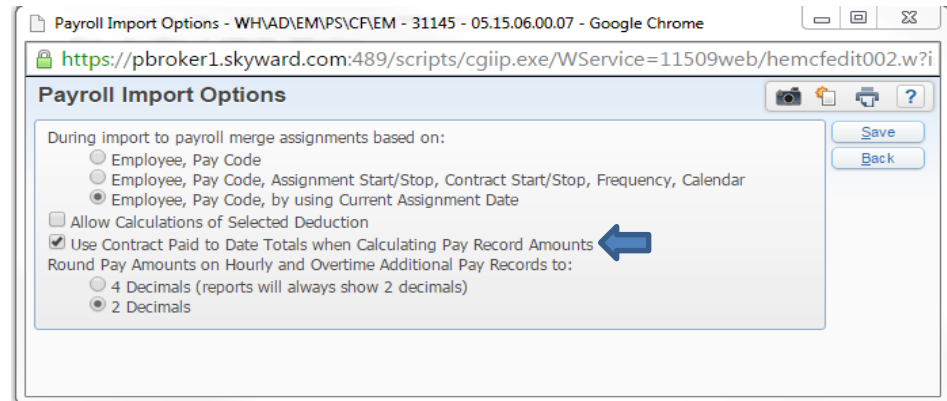
Matrix Created By: Cynthia N Muckscr

On import into payroll, select which salary amount on the assignment should be used when calculating the pay record amount.

- Use Assignment's Calculated Contract Amount (Default)
- Use Assignment's Per Diem Contract Amount

Asterisk (*) denotes a required field

District may choose to divide pay among remaining checks to account for mid year changes. Frequency codes must be updated after each pay to use.



Use Mass Processing in payroll to quickly enter new deduction/ pay and benefit values onto the profile.

HR\PA\MPP - 759 - Mass change codes/accept by record SHARING

Name: ASCHECAI001 Ascherscr, Caitlyn (PARA 10 MONTHS) Info

Employees meeting selection parameters						
Employee Name	Type	Code	Amt/Pct	Start Date	Stop Date	Maximum
Ascherscr, Caitlyn C	AID10	LHDEC	173.5000			0.00
Calcagniscr, Delia I	AID11	LHDEC	173.5000	09/01/2013		0.00
Comiskeyscr, Nadine I	TCH10	LHDEC	173.5000	09/01/2013		0.00
Dagenaiscr, Susie J	TCH10	LHDEC	173.5000	09/01/2010		0.00
Demarisscr, Adriana J	TCH10	LHDEC	173.5000	09/01/2011	08/31/2013	0.00
Eskerscr, Lance H	TCH10	LHDEC	173.5000	09/01/2013		0.00
Euellscr, Julee J	TCH10	LHDEC	173.5000	09/01/2013		0.00
Granadascr, Estefana H	TCH10	LHDEC	173.5000	09/01/2012		0.00
Guardiolascr, Nicholas I	ADML2	LHDEC	173.5000	09/01/2012		0.00
Haycockscr, Jenine R	TCH10	LHDEC	173.5000	09/01/2013		0.00
Headleescr, Yang N	TCH10	LHDEC	173.5000	09/01/2013		0.00
Ingoldscr, Oralia O	ADML2	LHDEC	173.5000	09/01/2013		0.00
Ishmanscr, Cathleen O	COUMS	LHDEC	173.5000	09/01/2010		0.00
Januszscr, Steve P	TCH10	LHDEC	173.5000	09/01/2011		0.00
Jorstadsr, Verla P	TCH10	LHDEC	173.5000	09/01/2011		0.00
Jungelsscr, Ailene O	TCH10	LHDEC	173.5000	09/01/2013		0.00
Laycockscr, Shala T	TCH10	LHDEC	173.5000	09/01/2013		0.00
Lewickiscr, Pauletta S	TCH10	LHDEC	173.5000	09/01/2013		0.00
Liebelscr, Ivory P	TCH10	LHDEC	173.5000	07/01/2013		0.00
Mahonyscr, Dina T	TCH10	LHDEC	173.5000	09/01/2013		0.00

The OK button processes all changes.

Deduction/Benefit Audit

Set the parameters to not include inactive profiles. Review deduction & benefit codes.

HR\PA\RE\PA\MF\DB - 3300 - Current Selection Parameters SHARING

As changed for this process.

Code Type

- Benefit
- Employee Building
- Employee Check Loc
- Deduction
- Employee Type

All

Select

None

Code	Description
ORPD	EMPLOYER PD
OMC	MEDICARE
OPST2	DEF COMP 457
OPSTA	OPST ADJ
OSS	FICA
OTC	TRS INS CT
OTCS	CARE SURCH
OTPS	PENSION SURCH
ATCP	REGION IV

Employees | Agdt'l Params

Inactive Profiles should be: Included Excluded Processed Alone

Select the code type. SkyDoc

Deduction/Benefit Audit



The report displays codes **not attached** to a pay record.
Review the report carefully. If appropriate, when the report closes the report can delete these codes from the Profile.

Deduction/Benefit Audit

PaC SkyPrint RTF - Deduction/Benefit Audit

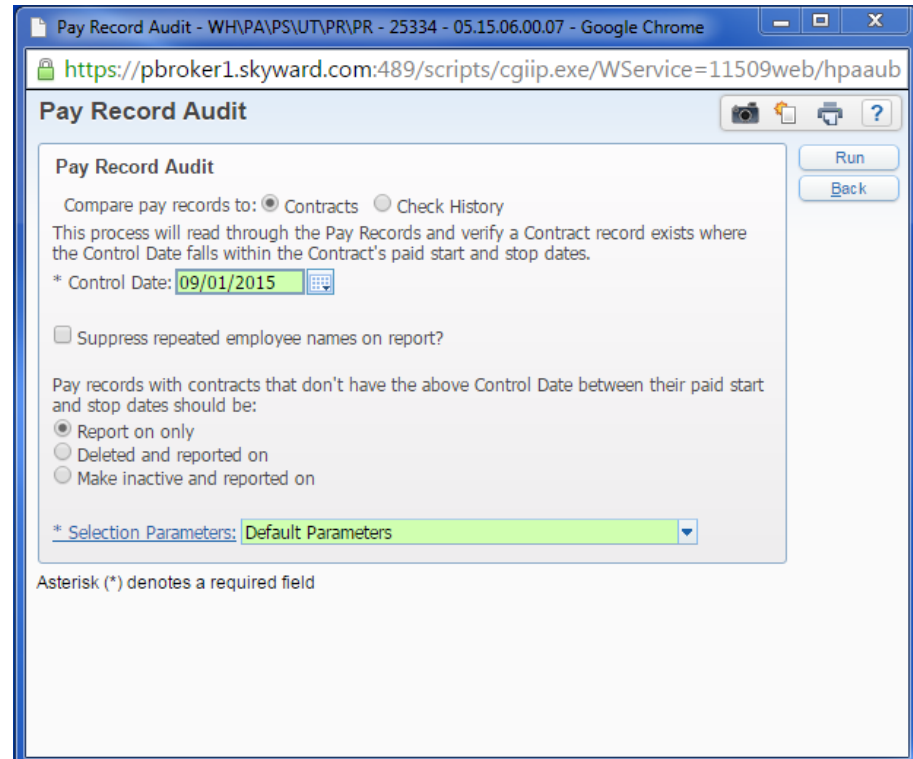
File Edit Page Font Tools Help

4parpt17.p SCRAMBLED DATABASE
05.15.06.00.00-010004 Deduction/Benefit Audit

NAME KEY	EMPLOYEE NAME	BLDG	CHECK	CODE	DESCRIPTION	AMOUNT		
CODE	DESCRIPTION	LOC	DESCRIPTION	TYPE	CODE	DESCRIPTION		
ALANSKEV001	Alanscr, Keva A	SUB	BUILDING - SUB	SUB	CHK LOC - SUB	D	OWHA W/H-ADD'L	25.00
ALIXSWEN001	Alixscr, Wendi G	TES	BUILDING - TES	TES	CHK LOC - TES	D	OTBB TRS BUY BACK	100.00
						F	OTCS CARE SURCH	100.00
CROMLVFL001	Cromleyscr, Velda I	MNT	BUILDING - MNT	SJH	CHK LOC - SJH	D	OWHA W/H-ADD'L	30.00
DOLSOCRY001	Dolsonscr, Crystal J	SUB	BUILDING - SUB	SUB	CHK LOC - SUB	D	OPST2 DEFER COMP 457	6.20
						F	OPST2 DEF COMP 457	1.30
GERMADEB001	Germanoscr, Debbie M	TRANS	BUILDING - TRAN	TRANS	CHK LOC - TRANS	D	OWHA W/H-ADD'L	25.00
HARRIFEL001	Harringscr, Felicita N	HES	BUILDING - HES	HES	CHK LOC - HES	D	OWHA W/H-ADD'L	10.00
HEYENCL1001	Heyenscr, Clifton R	ADM	BUILDING - ADM	ADM	CHK LOC - ADM	D	OMC MEDICARE	1.45
						D	OTC TRS INS CT	0.65
						D	OTRS TRS RET TX	7.20
						D	OWH W/H	0.00
						F	OMC MEDICARE	1.45
						F	OTC TRS INS CT	0.55
						F	GRPLF GRP TERM LI	0.75
HILTYTOM001	Hiltyscr, Tommy N	WHS	BUILDING - WHS	WHS	CHK LOC - WHS	D	OWHA W/H-ADD'L	50.00
INAMUJUL001	Imamurascr, Julietta J	TRANS	BUILDING - TRAN	TRANS	CHK LOC - TRANS	F	GRPLF GRP TERM LI	0.75
INGENCAR001	Ingemiscr, Carola S	FSE	BUILDING - FSE	FSE	CHK LOC - FSE	D	OMC MEDICARE	1.45
						D	OTC TRS INS CT	0.65
						D	OTRS TRS RET TX	7.20
						D	OWH W/H	0.00
						F	OMC MEDICARE	1.45
						F	OTC TRS INS CT	0.55
						F	GRPLF GRP TERM LI	0.75

Pay Record Audit

Control Date Run 3 times using a July, August and September date.



The screenshot shows a web browser window with the title "Pay Record Audit - WH\PA\PS\UT\PR\PR - 25334 - 05.15.06.00.07 - Google Chrome". The address bar shows the URL "https://pbroker1.skyward.com:489/scripts/cgiip.exe/WService=11509web/hpaaub". The page content includes a form titled "Pay Record Audit" with the following elements:

- Buttons for "Run" and "Back".
- Radio buttons for "Compare pay records to": Contracts, Check History.
- Text: "This process will read through the Pay Records and verify a Contract record exists where the Control Date falls within the Contract's paid start and stop dates."
- Text: "* Control Date:" followed by a text input field containing "09/01/2015" and a calendar icon.
- Text: Suppress repeated employee names on report?
- Text: "Pay records with contracts that don't have the above Control Date between their paid start and stop dates should be:"
- Radio buttons for selection: Report on only, Deleted and reported on, Make inactive and reported on.
- Text: "* Selection Parameters:" followed by a dropdown menu currently showing "Default Parameters".
- Text: "Asterisk (*) denotes a required field".

Pay Record Audit

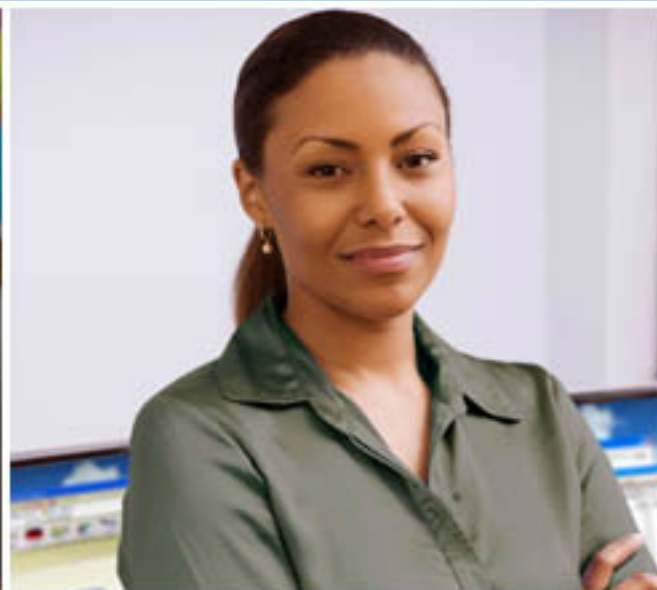


Run Report first to review. Change option to **delete or inactive** the pay records on the report. Set selection parameters to exclude Rate type pay codes –no contracts created Review report. Determine if these pay records should be Deleted or inactivated.

4paaurprt002.p 01-2 SCRAMBLED DATABASE 09/09/15 Page:1
 05.15.06.00.00 Pay Record Audit Report - Control Date 09/01/2015 8:54 AM

The following Pay Records have associated Contract Records, but the Control Date is not between Contract's Paid Start & Stop Dates.

Name Key	Employee Name	Pay	Pay Desc	Freq	Freq Desc	Factor	Amount	Primary	Active
ABEITHER001	Abeitascr, Herlinda G	MATH	STIP CRIT AREA	12	MONTHLY	1.0000	83.3300	No	No
ABEITHER001	Abeitascr, Herlinda G	TEACH	TEACHER	12	MONTHLY	1.0000	4,164.5800	Yes	Yes
ALBERSHA001	Albertiscr, Shannon G	PARA	PARAFRO	24	SEMI-MONTHLY	1.0000	519.2300	Yes	Yes
ALDAPAT001	Aldapescr, Pattie G	PARA	PARAFRO	12	MONTHLY	1.0000	1,597.6800	No	No
AMERIRE001	Amerinescr, Rebecca R	SPAN	SPANISH STIP	12	MONTHLY	1.0000	45.4500	No	No
AMERIRE001	Amerinescr, Rebecca R	TEACH	TEACHER	12	MONTHLY	1.0000	3,990.9900	No	No
AMODEGAB001	Amodeoscr, Gabrielle G	CHATR	COACH TRACK	12	MONTHLY	1.0000	208.3300	No	No
APOSCODE001	Aposcr, Odell G	BUS2	BUS DRIVER 2 RT	12	MONTHLY	1.0000	974.4500	No	No
ARAISPET001	Araisscr, Petra G	CHAIR	DEPT CHAIR	24	SEMI-MONTHLY	1.0000	266.6000	No	No
ARAISPET001	Araisscr, Petra G	TEACH	TEACHER	24	SEMI-MONTHLY	1.0000	8,671.5400	No	No
ARAISPET001	Araisscr, Petra G	TECH	TECH STIP	24	SEMI-MONTHLY	1.0000	250.0000	No	No
ARAKIVON001	Arakisscr, Vonda G	LDCOU	LEAD COUNSELOR	12	MONTHLY	0.0000	300.0000	No	No
ASBELCAR001	Asbellscr, Carla G	NURSE	SCHOOL NURSE	12	MONTHLY	1.0000	4,493.7500	Yes	No
ASKEYJEN001	Askeyscr, Jennifer D	TEACH	TEACHER	12	MONTHLY	1.0000	3,783.3300	No	No
ATTERSUS001	Atterburyscr, Susanna G	CHEER	CHEER SPONS	24	SEMI-MONTHLY	1.0000	62.5000	No	No
ATTERSUS001	Atterburyscr, Susanna G	PARA	PARAFRO	12	MONTHLY	1.0000	-321.5500	No	No
ATTERSUS001	Atterburyscr, Susanna G	TEACH	TEACHER	24	SEMI-MONTHLY	1.0000	1,904.0900	No	No
AUDIAED001	Audiascr, Eduardo G	ADM	ADMINISTRATOR	12	MONTHLY	0.0000	6,833.3700	No	No
AUGSBREA001	Augsburgerscr, Beatriz G	CUST	CUST	12	MONTHLY	1.0000	1,687.8000	No	No
ADVLIGE001	Auvilsscr, George B	SCIEN	SCIENCE	12	MONTHLY	1.0000	125.0000	No	No
ADVLIGE001	Auvilsscr, George B	TEACH	TEACHER	12	MONTHLY	1.0000	3,764.5800	Yes	No
AXLEYTAM001	Axleyscr, Tama C	ADM	ADMINISTRATOR	24	SEMI-MONTHLY	0.0000	1,414.5100	No	No
BEBOUFR1001	Beboutscr, Kristopher E	CHTN	COACH TENNIS	24	SEMI-MONTHLY	1.0000	33.4100	No	Yes
BELDINA001	Beldingscr, Nakia H	CUST	CUST	12	MONTHLY	1.0000	349.4400	No	No
BENTODEN001	Bentoscr, Dena H	JHFLG	JHFOUNDRING	12	MONTHLY	1.0000	83.3300	No	No
BENTODEN001	Bentoscr, Dena H	MASTP	MASTER DEG STIP	12	MONTHLY	1.0000	550.8000	No	No
BERNEAL1001	Berneyscr, Ali D	COUNS	COUNSELOR	24	SEMI-MONTHLY	1.0000	1,268.2800	No	No
BERTOWAL001	Bertoliniscr, Waltraud H	TAKCO	TAKS COORD	24	SEMI-MONTHLY	1.0000	125.0000	No	Yes
BERTSIRA001	Bertschr, Ira H	TEAM	TEAM LEADER	24	SEMI-MONTHLY	1.0000	50.0000	No	Yes
BILALASH001	Bilalscr, Ashli J	BUS1	BUS DRIVER 1 RT	1	1 CHECK	1.0000	5,235.1600	No	Yes
BILALASH001	Bilalscr, Ashli J	BUS2	BUS DRIVER 2 RT	24	SEMI-MONTHLY	1.0000	411.8800	No	No
BINNEALB001	Binneyscr, Alberta H	MENT1	MENTOR-DEC	1	1 CHECK	1.0000	200.0000	No	No
BINNEALB001	Binneyscr, Alberta H	MENT2	MENTOR-MAY	1	1 CHECK	1.0000	200.0000	No	No



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THANK YOU FOR ATTENDING!

