



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
- Payroll Selection Parameters
- Individual Select vs. Mass Select
- 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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Payroll Selection Parameters

HR\PA\CP\SE - 745 - Current Payroll Selection Parameters

Period End Date: 06/19/2019 Check Date: 06/19/2019 # of Times to Pay: 1

OK Report Close

ACA Entry Options Date Range: 07/05/2019 to: 07/05/2019

Employee/Pay Record Parameters Deduction/Benefit Times to Pay

Default Parameters (as changed for this payroll.)

Code Type

- Employee Building
- Employee Check Loc
- Employee Range
- Employee Type
- Frequency
- Pay

All Select

Employee Range

Low: High: ZZZZZZZZZZ

Ind. Empl.

Default Ded/Ben Times (as changed for this payroll.)

Deduction Codes		
Code	Description	Times
OMC	MEDICARE TAX	1
OPST	DEFER COMPENSAT	0
OPST2	DEFER COMP 457	1
OPSTA	OPST ADJ	0
OSS	FICA	1
OTBB	TRS BUY BACK	1
OTC	TRS INS. CONTRI	1

Benefit Codes		
Code	Description	Times
OERPD	EMPLOYER PD HEA	1
OMC	MEDICARE TAX	1
OPST	XXXXXXXXXXXXXXXX	0
OPST2	DEF COMP 457	1
OPSTA	OPST ADJ	0
OSS	FICA	1
OTC	TRS INS. CONTRI	1

Period End Date for this set of transactions, in MM/DD/YYYY format.

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Individual vs. Mass and Change Selection Parameters

HR\PA\CP\SE - 745 - Select for Payroll Run Number: Tstng / Testing

Current Parameter Selections

Parameter Set Description: Default Parameters (as changed for this payroll).

Ded/Ben Parameter Set Description: Default Ded/Ben Times (as changed for this payroll).

Period End Date: 06/19/2019 Check Date: 06/19/2019 Times To Pay: 1

Selected Transactions						
Name Key	Employee Name	Employee Type	Period End Date	Pay Code	Account Number	

Employee: _____ Name Key: _____

Current Selected Transaction Information			Employee Totals	
Rate/Amount: .0000	X		Total: 0.00	Hours/Factor: .0000
Hours/Factor: .0000	=		Pay Code: 0.00	Total: .00
Total: .00				

Select parameters.

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Adding Deduction/Benefit Codes within the Payroll

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

Name: BRADYTHO000 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: BRADYTHO000 Brady, Thomas (Cafeteria Work) Info OK Cancel

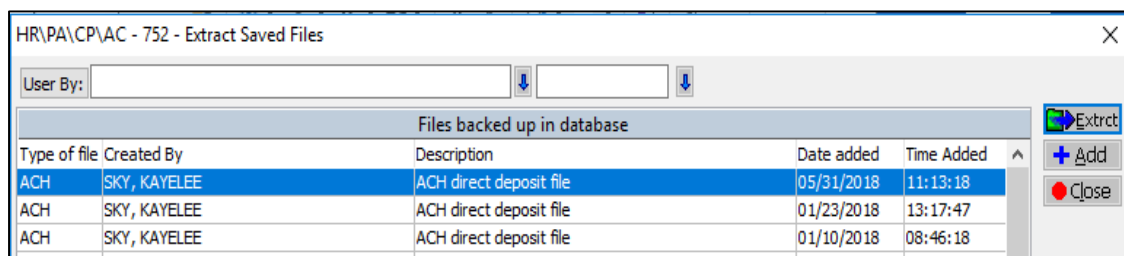
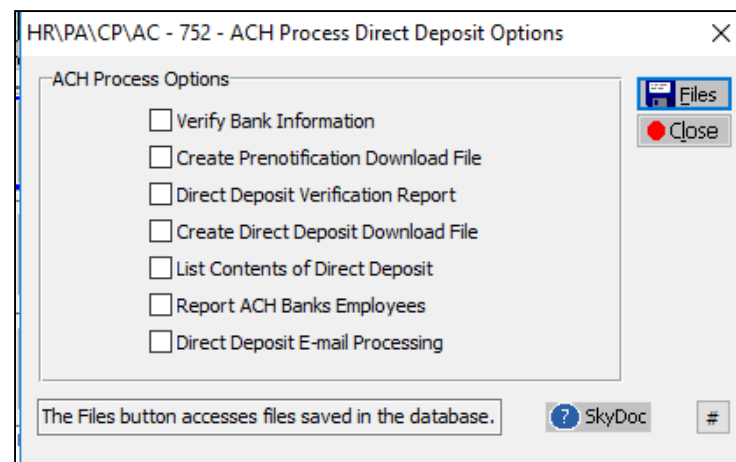
Available Control File Deds		Selected Transaction Deductions				
Code	Description	Code	Description	Type	Amount/Rate	Times
1TC	TRS-CARE	SVIS	VISION INS	Amt	20.0000	1
1TR	RETIREMENT	ATPE	ATPE	Amt	13.0000	1
CHLDS	CHILD SUPPORT	FEDT	FED TAX	Clc	0.0000	1
		FICAM	FICA-M	Clc	1.4500	1
		FICAR	FICA R	Clc	6.2000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

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

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 dedcs/bens to be attached to new pay record](#)

Set Pay Levels for Deductions/Benefits (385)

Views: **General** Filters: ***Skyward Default**

Code	Description	Deduction Pay Level	Benefit Pay Level
7BBG	BSKTBL GIRLS	1-All Pay	1-All Pay
ACEDR	ACE DIR STIPEND	1-All Pay	1-All Pay
ADM	ADMINISTRATOR	2-Primary Pay	2-Primary Pay
ADMNT	Asst. Dir. Main	2-Primary Pay	2-Primary Pay
ADPAY	ADD PAY	1-All Pay	1-All Pay
ARDFC	ARD FACILITATOR	2-Primary Pay	2-Primary Pay
ASBAN	JH ASST MARCH	1-All Pay	1-All Pay
ASSLT	ASSAULT LEAVE		
ASTBD	JH BAND DIR	1-All Pay	1-All Pay
ASTRA	ASST ATHL TRNR	1-All Pay	1-All Pay
ATHDR	ATHL DIRECTOR	1-All Pay	1-All Pay
ATHMT	ATHL GRDS MAINT	1-All Pay	1-All Pay
AUMGR	AUDITORIUM MGR	1-All Pay	1-All Pay
AUTO	AUTO ALLOW	1-All Pay	1-All Pay
BAND	BAND DIRECTOR	1-All Pay	1-All Pay

20 records displayed

Code: ABC



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THANK YOU FOR ATTENDING!

