



Texas Skyward User Group Conference

Payroll New Fiscal Year

Kayelee Lyons



Payroll New Fiscal Year



Starting a new payroll year is always a challenge. This session will discuss methods for minimizing the stress of updating Payroll records for the new fiscal year

- Assignment Export/Payroll Import
 - Running Payroll Comparison Report
 - Run the Pay Record Audit (using parameters to search for active pay records no longer linked with a contract)
- Mass Inactivate Contracts in prior fiscal years: Verifying active contracts are appropriate for the new fiscal year
- Deduction/Benefit Audit

Assignment Export



2019-2020 Active Plan (KR)

Kayelee Lyons Account Preferences Exit ?

Home Employee **Employee Administration** Payroll Time Off Substitute Tracking TrueTime Advanced Features Federal/State Reporting Custom Reports

Q| Human Resources Setup

- Employee Administration** Setup
 - Employee Management** Setup
 - Plan Management
 - Position Control Groups
 - Position Control
 - Assignments
 - Plan Processes
 - Assignment Export/Payroll Import Reports
 - Reports
- Position Request** Setup
 - My Positions
 - My New Hire Requests
 - Requests Waiting for Approval
 - Move To FastTrack
 - New Hire Request History
- Professional Development** Setup
 - Requests
 - Approvals
 - Move to Profile Credits
 - History
- FastTrack** Setup
 - Position Processing
 - Application Processing
 - Message Center
- Salary Negotiations** Setup
 - Plan Management
 - Position Control Groups
 - Position Control
 - Assignments
 - Plan Processes
 - Plan Detail
 - Budget
 - Reports

Assignment Export

Plan Parameters

Plan: 2019-2020 Active Plan (KR)

* 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

Report Run Back

Assignment Import

Assignment Export/Payroll Import Parameters	
Import Parameters Plan: <input type="text" value="2019-2020 Active Plan (KR)"/> * Selection Parameters: <input type="text" value="Default Parameters"/>	Select Non Contract Pay Codes to not Include in Merge Criteria <input type="text" value=""/> <input type="text"/>
Pay Record Factor Options for 'Rate Type' pay codes <input checked="" type="radio"/> Set to zero <input type="radio"/> Pull from assignment (Total Hours divided by frequency) <input type="radio"/> 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 <input type="radio"/> Do not import Paid Start/Stop Dates <input type="radio"/> Import Paid Start/Stop Dates into pay control file <input checked="" type="radio"/> Import Paid Start/Stop Dates into pay record
Contract Active Flag Options <input checked="" type="radio"/> Set to active and inactivate all other contracts with the same pay code <input type="radio"/> Set to inactive	Pay Record Creation Options <input type="text" value=""/> <input type="radio"/> Always create new pay record <input checked="" type="radio"/> If pay record exists update with assignment information, otherwise create a new pay record <input type="checkbox"/> Keep account distribution for Additional Pay Codes <input type="text" value="Set pay levels for dedts/bens to be attached to new pay record"/>
Deduction Calculation Options <input type="text" value=""/> Maximum Matrix Step: <input type="text" value="0.00"/> Calculation Percent: <input type="text" value="0.0000"/>	Contract Records Creation Options If contract record does not exist contract record is created. If contract record does exist: <input checked="" type="radio"/> Update with assignment information <input type="radio"/> Print exception
Payroll Import Options Based on Assignment Code Setup <input type="checkbox"/> Create Time Off setup information	Retirement Hours Options <input checked="" type="radio"/> Zero out retirement hours <input type="radio"/> Keep retirement hours from current pay record (if does not exist 0) <input type="radio"/> Get retirement hours from assignment (calendar hrs/frequency)

Payroll Comparison Report



The screenshot shows the Skyward web application interface. At the top, the user is logged in as 'Kayelee Lyons' with options for 'Account', 'Preferences', 'Exit', and a help icon. A navigation menu includes 'Home', 'Employee', 'Employee Administration', 'Payroll', 'Time Off', 'Substitute Tracking', 'TrueTime', 'Advanced Features', 'Federal/State Reporting', and 'Custom Reports'. Below this is a 'Reports' section with a search icon and 'Favorites', 'New Window', and 'My Print Queue' options. A tree view under 'Plan Reporting Options' lists several reports: Employee Management Report - EM, Personnel Report - PR, Position Control Report - PC, Assignment Report - AR, Payroll Comparison Reports - CP (highlighted with a blue arrow), Pay Distribution Report - PD, Plan Contract Comparison Report - CC, Person Count Report - PE, Assignment Breakdown Report - AB, TASB Group Breakdown Report - TG, and TRS Stat Min Report - SM.



The screenshot shows the 'Payroll Comparison Reports' configuration screen. It has a title bar with a camera icon, a printer icon, and a help icon. The screen is divided into three main sections: 'Select Report to Print', 'Report Description', and 'Employee Selection Parameters'.
Select Report to Print: A list of radio buttons with the following options:

- Compare Current Plan to Payroll
- Compare Payroll to Current Plan
- Combine the 2 Reports into 1 Report
- Compare Assigns in EM to Pay Recs in Payroll
- Compare Pay Rec Accts to Assignment Accts


Report Description: A text box containing the text: "The purpose of this report is to display an exception for each pay code assigned to a person that is not being used by an assignment in the selected plan. This report will only report on employees who are in the selected plan." To the right of this box are 'Print' and 'Back' buttons.

Employee Selection Parameters: A section with a dropdown menu labeled '* Selection Parameters:' and 'Default Parameters' selected.

Below the dropdown, it states: "Asterisk (*) denotes a required field"

Inactivate Prior Year Contracts

HR\PA\REV\PA\MF\EC - 3301 - Employee Contracts

Paid Start Date Range: to: 12/31/9999 Paid End Date Range: to: 12/31/9999  Reset

Work Start Date Range: to: 12/31/9999 Work End Date Range: to: 12/31/9999

Employee Contracts								Filters
Active?	Paid Start Date	Paid Stop Date	Name Key	Employee Name	Pay	Freq	Work Start	+
No	07/01/2008	06/30/2009	APOSCODE001	Aposcr, Odell G	PARA	12	07/07/2008	+
No	07/01/2008	06/30/2009	BRUENDEN001	Bruenscr, Denise H	PARA	12	07/07/2008	+
No	07/01/2008	06/30/2009	BUCHOJEA001	Bucholtzscr, Jean H	ADM	12	07/07/2008	+
No	07/01/2008	06/30/2009	BURTSHAR001	Burtsscr, Harold C	ADM	12	07/07/2008	+
No	07/01/2008	06/30/2009	CAREWROC001	Carewscr, Rochelle I	PARA	12	07/07/2008	+
No	07/01/2008	06/30/2009	CHOJNEIL001	Chojnackiscr, Eileen I	PARA	12	07/07/2008	+
No	07/01/2008	06/30/2009	DAVILTAM001	Davillascr, Tami J	ADM	12	07/07/2008	+
No	07/01/2008	06/30/2009	EDMANWIL001	Edmanscr, William H	ATHMT	12	07/07/2008	+
No	07/01/2008	06/30/2009	EDMANWIL001	Edmanscr, William H	TEACH	12	07/07/2008	+
No	07/01/2008	06/26/2009	EVESSSH1001	Evevscr, Shirley K	ADM	12	07/07/2008	+
No	07/01/2008	06/30/2009	FARHAMAR001	Farhatscr, Marion L	PARA	12	07/07/2008	+
No	07/01/2008	06/30/2009	FENSTZAN001	Fenstermakerscr, Zane L	TECNO	12	07/07/2008	+

Display only active contracts

Lookup: APOSCODE001

Double-click to edit selected record.

SkyDoc

Employee Contracts

Mass Change Paid/Work Dates and/or Active Flag

Note: Only contracts that fall within the date ranges of the browse screen will be processed.
If you modify any contract paid start or stop dates, the contract to date values will be automatically recalculated.

* Processing Option: 1-Report Only

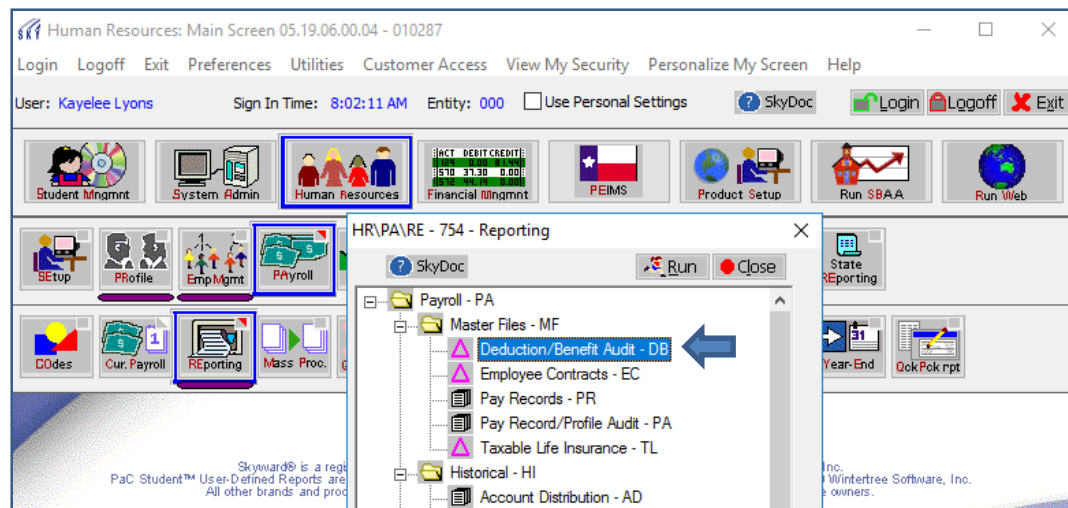
Field to Change	New Value	If Paid Start Date is:	
<input checked="" type="checkbox"/> Active Flag	to: No	Less Than	<input type="text"/>
<input type="checkbox"/> Paid Start Date	to: <input type="text"/>	<input type="checkbox"/> Only if old value =	<input type="text"/>
<input type="checkbox"/> Paid Stop Date	to: <input type="text"/>	<input type="checkbox"/> Only if old value =	<input type="text"/>
<input type="checkbox"/> Work Start Date	to: <input type="text"/>	<input type="checkbox"/> Only if old value =	<input type="text"/>
<input type="checkbox"/> Work Stop Date	to: <input type="text"/>	<input type="checkbox"/> Only if old value =	<input type="text"/>

When Modifying Dates, Inactive Contracts Should Be: Included Excluded Processed Alone

* Selection Parameters:

Asterisk (*) denotes a required field

Deduction/Benefit Audit





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THANK YOU FOR ATTENDING!

