

## Payroll: Salary Schedules

### Creating New Schedules and Transferring to Employees

Module – Personnel

Screen – Salary Schedule Definition

#### Creating New Schedules for the First Time:

1. Select “New” or F9 to create a new record.
2. Enter the following information:
  - Organ – Organization Code from the Primary Employee Screen
  - Schedule ID – Name of school year. Ex: 0809
  - Pay Scale - Name of pay scale. Ex: BSECY
  - Table Step – Steps in the scale
  - Pay Rate – Scale/step rate of pay
  - Rate Type – (Y) Yearly, (H) Hourly, (D) Daily
3. Select “Save” or F4 to save the record.

* Organ.	Schedule	Scale	Step	Pay Rate	Type
09	0809	BSECY	1.00	29783.600	Y
09	0809	BSECY	2.00	29783.600	Y
09	0809	BSECY	3.00	29783.600	Y
09	0809	BSECY	4.00	31862.600	Y
09	0809	BSECY	5.00	31862.600	Y
09	0809	BSECY	6.00	31862.600	Y
09	0809	BSECY	7.00	35951.300	Y
09	0809	CSECY	1.00	18772.600	Y
09	0809	CSECY	2.00	18772.600	Y
09	0809	CSECY	3.00	18772.600	Y

#### Creating New Schedules from Existing Schedules:

4. Make any changes to existing schedules if necessary (prior to creating new schedules).
  - Click on the record in the table that you wish to modify. The record will be displayed above the table.
  - Edit record
  - Select “Save” or F4 to save the record.
5. Create New Salary Table from Current Salary Table
  - **Operation** – *Create New Salary Table from Current Salary Table*
  - Organization Code of Schedule: Choose a code from the menu that you wish to duplicate

- Current Payroll Schedule Table ID: Enter the old table name to base the new table on. Ex: 0708A
- New Payroll Schedule Table ID: Enter the new table name to be created. Ex: 0809
- Multiply Current Table by factor: Enter the multiplier in if you have one. Ex: A 2.5% increase would be entered at 1.025
- Round results to: Enter the number of decimal places
- Proceed with the Operation: Yes
- Please verify that you intend to perform this operation: Yes

**Operation Request Setup**

Please enter the following data:

Organization Code of Schedule: 01

Current Payroll Schedule Table ID: 0708A (i.e. Table to base new Table on)

New Payroll Schedule Table ID: 0809 (i.e. new Table to be created)

Multiply Current Table by factor: 1.025000

Round results to: 0 decimal places.

Proceed with the Operation?

Yes No

Please verify that you intend to perform this operation.

Yes No

- Edit the salary grades for pennies and check it against your school agreement.

## Module – Personnel

### Screen – Longevity Schedule Definition

#### Creating New Schedules for the First Time:

6. Select “New” or F9 to create a new record.
7. Enter the following information:
  - Organ – Organization Code from the Primary Employee Screen
  - Schedule ID – Name of school year. Ex: 0809
  - Pay Scale - Name of pay scale. Ex: BA01
  - Longevity Step – Steps at which the longevity pay is added to the base salary
    - Note: You only need to add the steps at which the longevity pay is increased. The system will automatically use the same amounts for the range as used at the breakpoints. For example, if steps 5, 10, 15, 20 receive different longevity pay, then 6 – 9 will receive the same as step 5, and so on.
  - Amount – Amount of longevity pay to be added
  - Rate Type – (Y) Yearly, (H) Hourly, (D) Daily
8. Select “Save” or F4 to save the record.

**Module – Personnel**  
**Screen – Payroll Contracts/Salaries Preparation**

9. **For First Time Use** – Enter the following information for each employee for proper calculations:
- Pay Scale – Name of pay scale, Ex: BA01
  - Scale Step – Step in the pay scale, Ex: 8.00
  - Longevity Year – Year in which the employee is in for longevity, Ex: 1.00
  - Hours/Day
  - Days/Year
  - Contract % - 100% FTE or less, if not already appearing

10. **Reports** – Print the *Teachers Salary Worksheets* or *Payroll Contracts/Salaries/Rates Preparation Report*, depending on which group of employees you are working with. Verify the current table scale, step and amounts prior to updating the employees.

11. Increment the scale step and longevity year. Review the Scale Step and Longevity Year first and use this operation only if determined that the Scale Step and Longevity Year need to be increased. Warning, only use this operation once.

- **Operations – Increment Scale Step and Longevity Year**
- Do you wish to back up the Human Resources database now: Yes. Enter the backup drive information and follow the prompts. This will create a zip file.
- Organization Code: Choose a code from the menu
- Schedule ID: Enter the current year schedule. Ex: 0809
  
- Proceed with the Operation: Yes or No
- Please verify that you intend to perform this operation: Yes or No

12. Update the Pay Rates

- **Operation – Update Pay Rates from Personnel Salary Schedule Definition Screen**
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- The Payroll Contract/Salaries Preparation Screen should now have the pay rate dollar amounts updated on the records. If updating the salary schedule for yearly amounts, it will display in the Base Salary and Total Salary fields. Or, if updating the hourly/daily amounts, it will display in the Hourly and Daily fields.

13. **Reports** – Print the *Teachers Salary Worksheets* or *Payroll Contracts/Salaries/Rates Preparation Report*, depending on which group of employees you are working with, and verify the results.

14. Update Longevity Amount

- **Operation – Update Longevity Amount from Longevity Schedule Definition Screen**
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- The Payroll Contract/Salaries Preparation Screen should now have the longevity dollar amounts updated on the records. The longevity amount displays in the Longevity field and will add to a base amount to give a total amount in the Total Salary field.

15. Compute Hourly or Daily Rate – This step is only done if you have organizations with hourly and daily rates

- **Operation** – *Compute Total Salary from Hourly or Daily Rate*
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- The Payroll Contract/Salaries Preparation Screen should now have the hourly or daily dollar amounts updated on the records. The base amount will be calculated based on the hours/day and days/year and entered in the Base Salary field, which will add to a longevity amount to give a total amount in the Total Salary field.

16. Transfer Contracts/Salaries to payroll

- **Operation** – *Transfer Total Salary to Payroll Primary Contract/Salary Screen*
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- Proceed with the Operation: Yes
- Please enter the following data Organization code: Choose from the menu
- Start Date for the Primary Contract/Salary: Ex: 07/01/2008
- End Date for the Primary Contract/Salary: Ex: 06/30/2009
- Service Hours per Payroll Period: Ex: 80.00
- Service Pays for MPSERS Reporting: Ex: 26
- Contracted: Choose Salaried or Contracted
- Please verify that you intend to perform this Operation: Yes or No

**Transfer Total Salary to Payroll Primary Contract/Salary Screen**

Warning: You should perform a backup of the Human Resources database files, BEFORE you begin mass change Operations today. After you have done a backup, you can continue doing other mass changes without doing any more backups today.

Do you wish to back up the Human Resources databases now?

This Operation does the following:  
All employees whose Organization code on their Primary Personnel Data Screen matches the Organization code entered below will have their Total Salary transferred from this screen to the Payroll Primary Contract/Salary Screen

Proceed with the Operation?

Please enter the following data

Organization code	OTHER SUPPOR
Start Date for the Primary Contract/Salary	04/30/2009
End Date for the Primary Contract/Salary	06/30/2009
Service Hours per Payroll Period	70.00
Service Pays for MPSERS Reporting	26
Contracted?	Salaried

Please verify that you intend to perform this operation.

17. The following information will be updated on the Primary Contract/Salary Screen

- **Contract Figures – New Amount** – The system will transfer the Total Salary to the New Amount field.
- **Payroll Figures – New Amount** – The system will divide the Total Salary by the number of Pay Installs and enter the bi-weekly or semi-monthly amount in the New Amount field.
- **MRSERS Information** – The system will fill these fields based on information entered by the user in the operation.
  - Begin Date/End Date
  - Service Units
  - Service Pays

**Module – Personnel  
Screen – Teacher Contract Setup**

18. Print Teacher Contracts

- Organization – Enter the name of your organization
- Department – Enter the name of the department
- Street Address, City, State, Zip – Enter the information

Teacher Contract Controls:

- Issue Date – Enter the date of contract issue
- Contract Year – Enter the contract year
- Con. Length – Optional, enter the contract length
- Starting Date – Enter the start date of the contract
- Ending Date – Enter the end date of the contract
- First Payroll – Enter the date of the first pay
- Return Date – Enter the date the employee is to return to work

Print Items on Contract: Enter a Y to have an item print on the contracts, or N to not print

- Longvty Year
- Longvty Amt.
- Extra Hours
- Adjustment
- Sick L. Bal.
- Addl Sick L.
- Sick L. Bank

Teacher Employment Contract – Optional Message Lines

- Line 1
- Line 2

**Teacher Contract Setup Screen**

Organization Name, Address, etc.

Organization : MiCase Test School

Department : High School

Street Address : 1234 North St.

City, State : Kalamazoo MI

Zip - plus : 49002

Teacher Contract Controls

Issue Date : 08/01/2008

Contract Year: 2009

Con. Length :

Starting Date: 08/01/2008

Ending Date : 06/30/2009

First Payroll: 08/15/2008

Return Date : 08/27/2008

Print Items on Contract?

Longvty Year?: Y

Longvty Amt.?: Y

Extra Hours? : N

Adjustment? : N

Sick L. Bal.?: Y

Addl Sick L.?: N

Sick L. Bank?: N

Teacher Employment Contract - Optional Message Lines

Line 1 : Sign and return the Administrative Copy to the Payroll Dept.

Line 2 :

**19. Reports – Teacher Employment Contracts – Laser Form**

- Print Contracts for All Employees or One Employee – Choose from the drop down menu
- Proceed with report request – Yes or No
- Preview the contracts then print. You will receive 3 copies.
- Note – One/All employee(s) with Organization code = 01 who are not terminated or currently on Leave, will have a Teacher Employment Contract printed as defined by the control fields on this screen.
- Note – For report modifications, contact the helpdesk for assistance.
- Note – This report requires a bitmap file for the signature. Contact the helpdesk for assistance in setting this up if not already done.

**Module – Personnel**  
**Screen – Salary Schedule Definition**

**20. Transfer Pay Rates To Employee Gross Pay Rates Screen**

- Prior to running this operation, go to the Payroll Employee Records Module, Employee Gross Pay Rates Screen and enter the Pay Scale and Step on each employee. This will determine which rates are used to populate the records.
- From the Gross Pay Rates Screen, run the report for Employee Gross Pay Rates Records, which will be used to verify the rate transfers.
- **Operation – Transfer Pay Rates to Employee Gross Pay Rates Screen**
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- Organ. Code: Choose from the menu
- Schedule ID: Ex: 0809
- Proceed with the Operation: Yes or No
- Please verify that you intend to perform this operation – Yes or No
- From the Gross Pay Rates Screen, run the report for Employee Gross Pay Rates and verify the results.

## Module – Personnel

### Screen – Payroll Contracts/Salaries Preparation

If teacher contract amounts and bi-weekly (payroll) amounts are to change after the school year has begun, then you will use one of the two following operations to change them in mass:

- #21 - *Transfer Personnel Teacher Salaries to Payroll - With 'Retro Pay'* – This operation may be used when you want the system to automatically calculate a new payroll (bi-weekly) amount, based on a new contract amount, which will also include a one-time amount representing “retro pay”. This operation will not affect the Earnings which have accumulated since the contract payments began.
- #22 - *Mid-Contract Transfer New Salary to Payroll Primary contract/Salary Screen – Calculate new Payroll Amount* – This operation may be used when you want the system to automatically calculate a new payroll (bi-weekly) amount, based on a new contract amount, for the remaining payrolls of the school year. This operation does not include a one-time retroactive payment, and will not affect the earnings which have accumulated since the contract payments began.

#### 21. Transfer Personnel Teacher Salaries to Payroll – With 'Retro Pay'

##### Prior to Settling the Contracts (at the beginning of the fiscal year):

- Increment the scale step and longevity year
- Update the pay rates (this will be based on the prior year pay schedules until contracts are settled)
- Update the longevity amounts
- Compute the total salary
- Transfer contracts/salaries to payroll

##### After the Contracts are Settled:

- Update the Salary Schedules on the definition screen with the new amounts
- Update the Longevity Schedules on the definition screen with the new amounts
- Compute the total salary
- **Operation** - *Transfer Personnel Teacher Salaries to Payroll – With 'Retro Pay'* – This operation will select all employees with Organization code = 01 and have their Total Salary transferred from the Personnel Contract/Salary Preparation Screen to the Payroll Primary Contract/Salary Screen.
  - Follow the prompts as above in step 11 for the backup and selections. A zip file will be created.
  - Proceed with the operation – Yes or No
  - Number of retroactive payrolls to include in one-time – Enter the number of pays that were already paid at the old rates to calculate what is owed retroactively
  - ORS Begin Date of Retroactive Payments – Enter the date of the first retroactive pay
  - ORS End Date of Retroactive Payments – Enter the date of the last retroactive pay
  - Please verify that you intend to perform this operation – Yes or No



- The following updates will occur on the Primary Contract/Salary Screen:
  - The New Amount fields will be updated
  - The One-Time Amount field will be updated with the retroactive pay amount
  - In the Additional Wage Codes in Payroll Amount fields (lower right), the following will occur:
    - Code 1 – A 04 for retroactive payments will be displayed
    - Amount – The retroactive payment amount will be displayed
    - Begin and End Dates – Will display the dates entered when running the operation

22. Mid-Contract Transfer New Salary to Payroll Primary Contract/Salary Screen – Calculate New Payroll Amount

This newer operation updates the *Primary Contract / Salary Screen* with a *New Amount* in the *Contract Figures* section and a *New Amount* in the *Payroll Figures* section. The system does the following: The *Total Salary* from the screen is transferred to the *New Amount* in the *Contract Figures* section of the *Primary Contract / Salary Screen*. Then, the system calculates a new *Balance* by subtracting the *Earnings* from the new contract amount. Finally, the system calculates a new payroll amount by dividing the new balance by the *Number of remaining payrolls to process* entered when the Operation is run. Note that, unlike similar operations, this new operation does not calculate a one-time retroactive payment and does not set the *Earnings* back to zero.

- **Operation** – *Mid-Contract Transfer New Salary to Payroll Primary Contract/Salary Screen – Calculate New Payroll Amount*
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- Proceed with the Operation: Yes
- Please enter the following data Organization code to process: Choose from the menu
- Number of remaining payroll to process: Enter the number of payrolls

- Please verify that you intend to perform this Operation: Yes or No

**Transfer Primary Contract figures to Payroll - for Remaining Pays**

Warning: You should perform a backup of the Human Resources database files, BEFORE you begin mass change Operations today. After you have done a backup, you can continue doing other mass changes without doing any more backups today.

Do you wish to back up the Human Resources databases now?

This Operation does the following:  
All employees with Organization code = 01 will have their Total Salary transferred from the Personnel Contract/Salary Preparation Screen to the Payroll Primary Contract/Salary Screen and a new Payroll Amount calculated for Remaining Pays.

Proceed with the Operation?

Please enter the following data

Organization code to process: SECRETARTY

Number of remaining payrolls to process: 10

Please verify that you intend to perform this operation.

23. Update REP with Rates from the Payroll Contracts/Salaries Preparation Screen – All employees whose Organization code on their Primary Personnel Data Screen matches the Organization code entered in the operation will have their Pay Rate updated with the Pay Rate from the Salary Schedule Definition Screen, for the **lowest** Step found for the Pay Scale shown on the Payroll Contracts/Salaries Preparation Screen.

- **Operation** – Update REP Annual and/or Hourly Rates from Rates on this Screen
- Follow the prompts as above in step 11 for the backup and selections. This will create a zip file.
- Organization Code – Enter the code for the group you wish to update
- Schedule ID – Enter the schedule you wish to use for pay rates
- Proceed with the Operation – Yes or No
- Please verify that you intend to perform this operation – Yes or No

**Update REP Annual and/or Hourly Rates from Salary Schedule Screen**

Warning: You should perform a backup of the Human Resources database files, BEFORE you begin mass change Operations today. After you have done a backup, you can continue doing other mass changes without doing any more backups today.

Do you wish to back up the Human Resources databases now?

This Operation does the following:  
All employees whose Organization code on their Primary Personnel Data Screen matches the Organization code entered below will have their Pay Rate updated with the Pay Rate from the Salary Schedule Definition Screen, for the **lowest** Step found for the Pay Scale shown on the Payroll Contracts/Salaries Preparation Screen for the employee.

Organization code: PROFESSIONAL

Schedule ID: 0809

Proceed with the Operation?

Please verify that you intend to perform this operation.