



# Payroll Process In Nextgen

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# Topics

- Payroll Set-Up for New Employees
- Changing Jobs
- Terminating Employees
- Prorated Pay
  - Mid-Year Degree Changes
  - Contract Payoffs
- Fringe Benefits
- Leave Initialization



# New Employee Set-Up



Social Security #	[Redacted]	Title	<input type="text"/>
First Name	[Redacted]		<input type="text"/>
Middle/Initial	[Redacted]		<input type="text"/>
Last Name	[Redacted]		<input type="text"/>
Suffix	<input type="text"/>		
Alias 1(Maiden)			<input type="text"/>
s 2(ACA Override)			<input type="text"/>

Address Type	Home	Years at Address	0
Address	[Redacted]		
City	[Redacted]		
State	[Redacted]		
Phone Type	[Redacted]		
Number	[Redacted]		
Email Address	[Redacted]		

- Name and address fields are necessary for LEAPS.
- Social security card name must be entered.
- If there is no address, you will receive an error on both LEAPS and W2's
- ACA Override: Social security card last name versus Nextgen last name. RARE

# Education

## LEAPS Requirement

Show/Add Education														
C...	Description	Degree	B...	E...	Yr...	Hr...	Gr...	E...	Tra...	Highest	R...	Se...	Q...	Unoffi...
999	Unknown College	1			0	0		0		Yes		True	F...	

College  Unknown College

Degree  BACHELOR

☒ Highest Degree Earned

- 1 – Bachelor
- 2 – Masters
- 3 – Education Specialist
- 4 – Doctorate
- 0 – No Degree



- LEAPS requires a “Highest Degree Earned” marked if there is a degree under education
- College can be entered; Unknown College
- If employee receives a higher degree, the High Degree Earned must be updated

# Experience

## LEAPS REQUIREMENT

T...	Description	Yrs	M.	Date Began	Date Ended	Job Title	Verified	
E	Certified - Alabama Exper...	4	3				Yes	
P	Certified - Out of State Ex...	2	0				No	
T	Certified - Cullman Experi...	0	0	01/2022			Yes	
V	Certified - Private Experie...	0	0				Yes	
T	Certified - Cullman Experi...	2	0	08/2012	05/2014		Yes	

The LEAPS generate will add like experience codes together

Type  Certified - Cullman Experience

☒ Beginning Date 
☐ Thru Date

Years  Months

☒ Experience Verified

Job Title

Supervisor

Contract Days

Standard Contract Days

☐ Previous Employer Data

- Add experience as you enter a new employee to be accurate with contract days
- Contract Days and Standard Contract Days drive the months of experience an employee will receive when updating experience for LEAPS
- The experience also drives the tenure code during Tenure Update
- If the Contract Days equal Standard Contract Days than 12 month experience will be given.
- Multiples of each Experience Type may be used
- Use the Experience Verified toggle for verifications

Contract Days

Standard Contract Days



# Personnel Data

Gender  Female

Birth Date

Ethnicity  WHITE

Marital Status  Married

Retirement Years

Person Status

Original Hire Date

☐ Do Not Renew Contract

☐ Speaks Spanish

☐ E-Verified

## LEAPS Requirement

☒ Tenure Date  Tenure Code

Certified Code  Certified

ACA Offer of Coverage Code  Qualifying Offer of Coverage

☐ Employee Requests Electronic Forms

☒ Employee Requests Electronic DD Stmts

- LEAPS Requires:
  - Gender, birthdate, ethnicity, speaks Spanish, tenure code, certified code
- Tenure Date is informational only
  - Needed for verification when Update Tenure is ran
- E-Verified flag for complete; will show up on Compute if not flagged
- ACA coverage – verify if changing jobs
- Employee Requests:
  - All forms including W2, Truth and 1095
  - DD only

# Certificate

Not Required but useful

Number	ST	Type	Description	C...	R...	From	Thru	Issued	Active	O...	C...
axg 0118 [REDACTED]	AL	SUB	SUBSTITUTE			11/17/2020	6/30/2026	11/17/2020	Yes	No	No

State AL Number AXG 0 [REDACTED]

Certificate Type SUB SUBSTITUTE Class:

**1. General**

Validity Dates 11/17/2020 To 6 /30/2026 Name in Which Certificate

Date Issued 11/17/2020 Highest Level 0

☒ Active ☐ Copy of Certificate on File

☐ Nationally Board Certified ☐ Original Certificate On File

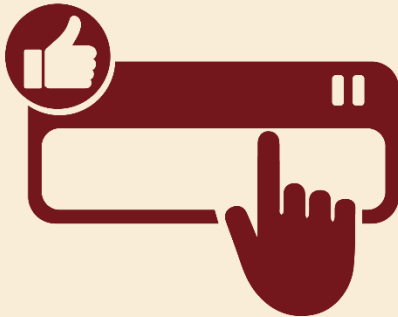
Enter sub licenses to track expiration dates

Available to enter Teachers Certificates

Under Personnel Reports under HR, the Certificate Expiration List shows expiration dates based on criteria

# User Defined

Not Required but useful



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User Field

Add User Defined Data

User ...	Description	Value
PID	PEEHIP ID	15

SC/HRND: HR Code Maintenance III (v3.10)

6. College Code 7. Degree Code 8. Major/Minor 9. Document 10. Test Type

1. PC Status 2. PC Type 3. PC Approval 4. Position Class 5. PC Contract

11. User Fields 12. PC Reason 13. NHire Reason 14. ACA Coverage

User Field Name

Field Description

Field Data Type  Alphanumeric Text

Inquire Mode: Enter the Key Word for the Desired Record

Data Type:

- AlphaNumeric
- Checkbox
- Date
- Numeric

Keep track of anything



Employee Status Active

Employee Hire Date 8 /12/2013

Reporting Loc. 0020 CULLMAN HIGH SCHOOL

Check Location 0020 CULLMAN HIGH SCHOOL

Default Pay Period M Monthly

Retirement

- ☐ Retirement Withheld
- ☐ Do Not Withhold
- ☒ Use Default

RSA Flag

- ☒ Contributing
- ☐ Non-Participating
- ☐ Do Not Report

Retire Tier 01

# Employee Data

Employee Hire Date: New Hire Reporting

Retirement Deduction driver  
RSA Reporting flag

Comments

\*\*\* Comments \*\*\*

HR/COMM Comment Entry Form

Date 05/01/2022 ☐ Confidential Add Comments

Comment Add Item

Date	Comment
04/15/2022	FMLA 4/4 - 5/27/22 salary prorated 21-22 salary comp in file

Accept Changes Cancel Changes

Enter Date, Comment And Click Add Item

Use Comments to maintain changes in salary information or other payroll changes



**Federal Tax Data**

☒ 2020 Form      Federal Tax Status M

☐ Multiple Jobs or Spouse Works

Other Dependents Amount	<input type="text" value="0.00"/>
Other Income Amount	<input type="text" value="0.00"/>
Other Deductions Amount	<input type="text" value="0.00"/>
Extra Withholding Amount	<input type="text" value="0.00"/>

☐ Exempt From FWH

☐ Under IRS Regulation Do Not Change Settings

**State Tax Data**

State Tax Status M      Exemptions

State \$ or %

☒ Tax Table      ☐ Fixed

☐ Additional      ☐ Percent %

☐ Exempt From SWH

SWH Exempt Amount

SWH # of Dependents       SWH Addl Allowances

- State Exemptions should never be greater than 2
- If claiming 0 on tax form, then S and 0 exemption
- If claiming S on tax form, then S and 1 exemption
- If claiming M or H, then M (H) and 2 exemption
- Dependents go in dependent field

# Salary Schedule

Code	Rank	Step	Related Salary Sch			<input checked="" type="checkbox"/> Add 1 to Step at Year End					
Code	Rank	Step	Code	Rank	Step	Supp. Amount			Supp. Percent		
C...	Description	R...	Step	Add 1	%...	%...	%...	Su...	Su...		
T9	TEACHER - 188 DAYS	A	7	Yes				0.00	0%		

- Add 1 to Step must be selected if salary is to increase to the next step
- Multiple salary schedules may be added
- Salary schedule must be entered here before adding to a job; salary schedule not being paid if not added to a job record

# Job Record Data

Job	Type	Description	Status	JLOC	Descr...	Pay Code	Job T...	
1	T9	TEACHER 9M	Active	0050	CULL...	Monthly	Prima...	
2	SP	SUPPLEMENT - ATHLETIC / A...	Terminated	0050	CULL...	Monthly	Supp...	
3	SU	SUBSTITUTE	Terminated	0050	CULL...	No-Pay	Additi...	
60	NP	NONPENS LUMP SUM STIPE...	Active	8211	EXTR...	Monthly	Supp...	
63	EP	EXTRA PAY	Active	0000	Defa...	Monthly	Additi...	

Must have at least one primary job.

Job numbers do not matter

Employee Type must match RSA/PEEHIP portal

- Eligible For a Sub must be selected if adding a sub to employee leave
- For substitutes, Job Status must be Sub in order to sub for employees
- Can have multiple salary schedules to one job based on circumstance

Job Number 
Employee Type

Job Type 
TEACHER 9M

Employment Date

Service Date

☒ Eligible For A Substitute

Job Status/Date

Substitute Category

Pay Period

Job Location  CULLMAN CITY PRIMARY SCHOOL

Replace Emp #

Show All Jobs

Salary Schedule Information

Anniversary Date

Code-Rank-Step  Percent 
Add/Update Item

Sal Sch	Descr...	Percent
T9 - A - 7	TEAC...	100%

☒ Print On Service Report

☐ Paid in Full 
Add/Update Item

# Job Pay Record

## LEAPS Requirement

Job Number	1	Employee Type: T9	TEACHER 9M	Job Status: Active	
Contract Days	188.00	State Salary Unit	0.00	Total of All Active Jobs Annual: 55,337.00 Monthly: 2,904.21	
Percent Worked	100%	State Based Salary	0.00		
Annual Salary	55,337.00	Full Time Earnings	4,611.42	<b>Exempt From</b> <input type="checkbox"/> 1. Federal Tax <input type="checkbox"/> 2. State Tax <input type="checkbox"/> 3. Social Security <input type="checkbox"/> 4. Medicare <input type="checkbox"/> 5. City Tax <input type="checkbox"/> 6. County Tax <input type="checkbox"/> 7. Retirement <input type="checkbox"/> 8. SUI <input checked="" type="checkbox"/> 9. Worker's Comp <input type="checkbox"/> Matching Insurance	
Salaried Periods	12	Summer Pay Flag			
Pay Period Salary	2,904.21	<input checked="" type="checkbox"/> Include Job in LEAPS Reporting			
Hourly/Daily Code	D	<input type="checkbox"/> Use Pay Dates	<input type="checkbox"/> Use End Pay Date		
Hours Per Day	7.50	5 / 1 /2022	Thru 5 / 1 /2022		
Rate of Pay	294.35	<input type="checkbox"/> Use Contract Dates			
Overtime Rate	441.53	1 / 1 /1900	Thru 1 / 1 /1900		
Accrual Days	24.33	<input type="checkbox"/> Calculate Salaries			

- LEAPS Data will include contract days, annual salary, H/D Code, and hours per day
- Flag for “Include Job in LEAPS Reporting” must be selected in order to pull into LEAPS.
  - Employee Type Maintenance default
  - Mass Change Job Records Transaction
- Job Types will determined Exemptions
- Pay Dates
- Contract Days/salaries periods for Late Starts

# Job Leave Record

T...	Description	All...	Beg Bal	Accrued	Taken	Max.	Ba...	Active	Acc. Date	Adjus...	
1	SICK	9.00	2.00	8.00	3.50	999...	2.50	Yes	8/9/2011	-4.00	
2	PERSONAL	5.00	0.00	5.00	0.50	5.00	4.50	Yes	8/9/2011	0.00	
5	Covid FFCRA	0.00	0.00	0.00	5.50	0.00	-5.50	Yes	11/15/2021	0.00	
P	PROFESSIO...	0.00	0.00	0.00	7.00	0.00	-7.00	Yes	4/21/2014	0.00	
P1	Elementary PD	0.00	0.00	0.00	3.50	0.00	-3.50	Yes	3/24/2021	0.00	
S...	SICK BANK	99...	-0.50	0.00	1.50	999...	2.00	Yes	9/16/2014	4.00	

If leave is driven by years of service, the Acc.Date must be set to the beginning date of experience.

Hired employees at the beginning of the school year that opt to be part of the sick bank must be made members by giving them days up front and then removing them

[View Fringe Benefit Data](#)

## Fringe Benefit Information

Code

Amount  ☐ Active

Code	Description	Amount	Active	
L	GTL FRIN...	1.52	Yes	



# Deductions

Not on LEAPS

Job Number

Employee Level Deductions

Employee Status

Quarter Num

1

Calendar Year

2022

Ded#	Description	Monthly	Board	Qtrly	Y-T-D	Limit	Tot. D...	Active
1	FWH	0%	0%	1,324...	1,747.01	0.00	0.00	Yes
2	STATE W/H	0%	0%	578.87	760.68	0.00	0.00	Yes
3	SOC SEC	6.2%	6.2%	861.20	1,127.60	9,114.00	1,127.60	Yes
4	FICA	1.45%	1.45%	201.40	263.70	0.00	0.00	Yes
8	SUI MATCH	0%	0.07%	0.00	0.00	0.00	0.00	Yes
9	MATCH INS	0.00	800.00	0.00	0.00	0.00	0.00	Yes
11	RETIREMENT	7.5%	12.43%	1,133...	1,486.12	0.00	0.00	Yes
12	SUPPLEMENT	88.00	0.00	264.00	352.00	0.00	0.00	Yes
13	PEEHIPWELL	0.00	0.00	0.00	0.00	0.00	0.00	Yes
26	AF CANCER	35.20	0.00	105.60	140.80	0.00	0.00	Yes
30	HOSP INS	207.00	0.00	621.00	828.00	0.00	0.00	Yes
33	LOCAL DUES	0.00	0.00	0.00	0.00	0.00	0.00	No
39	NEA PROF.	0.00	0.00	0.00	0.00	0.00	0.00	No
42	AFA/DUES	0.00	0.00	0.00	0.00	0.00	0.00	No

- Mandatory deductions load automatically
- Direct Deposit entered as a deduction
- PEEHIP deductions will load with file upload
- Retirement based on settings below

## Retirement

- Retirement Withheld
- Do Not Withhold
- Use Default

Use Default:  
Retirement  
automatically  
added based on  
Parameter setting

## Retirement

- Retirement Withheld
- Do Not Withhold
- Use Default

Retirement Withheld:  
retirement must be  
manually entered on  
deduction screen

# GL Distribution

## LEAPS Requirement

Job Number  Employee Type: T9 TEACHER 9M Job Status: Active

Fiscal Year

Show/Hide G/L Distribution

Account Number	Year	Curr. %	Curr. ...	Budget ...	FYTD Tot	glacc...	FTE
11-5-1100-010-0030-1110-0-1200-0000	2022	100%	0.00	56,444.00	32,925.69	500001	1.00

Job Number  Employee Type: T9 TEACHER 9M

Fiscal Year

G/L Acct

INSTRUCTION-TEACHER

Current Percent  Budget Total

Current Amount  ETE

FYTD Total 32,925.69

- GL needed for any record with a pay period salary
  - Compute error
- Percentage: How much of the salary goes to the GL?
  - As many as needed but must equal 100%
- FTE: Full Time Equivalent
  - Percentage of time in that GL position



# Job Earning Data / State Specific

Job Number All Employee Type:

Calendar Year 2022

Description	Quarter 1	Quar...	Quarter 3	Quar...	Year To ...
Gross	15,111.01	4,70...	0.00	0.00	19,814.68
Federal Tax Wa...	12,757.15	3,94...	0.00	0.00	16,701.20
Federal Tax W/H	1,324.32	422.69	0.00	0.00	1,747.01
Earned Income ...	0.00	0.00	0.00	0.00	0.00
State Tax Wages	13,890.49	4,29...	0.00	0.00	18,187.32
State Tax W/H	578.87	181.81	0.00	0.00	760.68
Social Security ...	13,890.49	4,29...	0.00	0.00	18,187.32
Social Security ...	861.20	266.40	0.00	0.00	1,127.60
Medicare Wages	13,890.49				18,187.32
Medicare W/H	201.40				263.70
Additional Medic...	0.00				0.00
Additional Medic...	0.00				0.00
Retirement Wag...	15,111.01				19,814.68
City Tax Wages	0.00				0.00



Retirement Data

Member Class

Units W

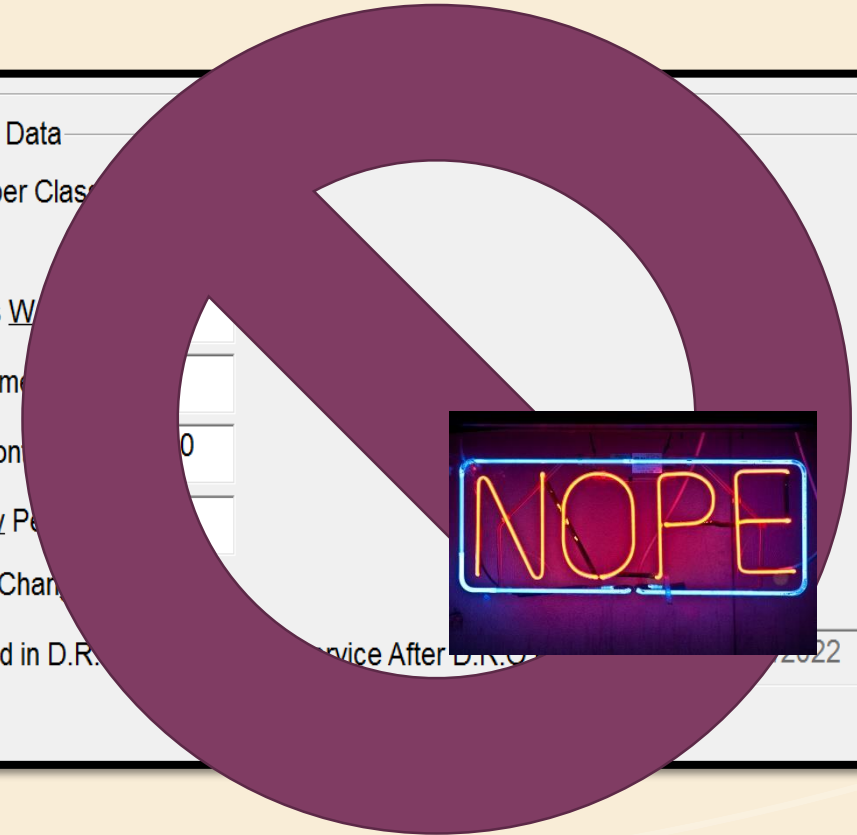
Full Time

Units Con 0

Pay P

☒ Name Chan

☐ Enrolled in D.R. Service After D.R.O. 2022



# Changing Employee Jobs

Code	Rank	Step	Related Salary Sch			Add 1 to Step at Year End		Supp. Amount		Supp. Percent	
			Code	Rank	Step						
IB											
T9											

C...	Description	R...	Step	Add 1	%...	%...	%...	Su...	Su...
IB	Instructional Asst. - 7 hrs	00	0	Yes				0.00	0%
T9	TEACHER - 188 DAYS	B	0	Yes				0.00	0%

1. Add new salary schedule to salary schedule screen

2. Select old job in Job Record Data and terminate with termination date and change job type

## Employee Type

Job	Type	Description	Status
1	TA7	TEACHER AIDE 7HRS	Active
2	SP	SUPPLEMENT - ATHLETIC / A...	Active
60	NP	NONPENS LUMP SUM STIPE...	Active
63	EP	EXTRA PAY	Active

Job Number	1	Employee Type	TA7
Job Type	Additional Job	TEACHER AIDE 7HRS	
Employment Date	1 / 20 / 2021		
Service Date	1 / 20 / 2021		
<input checked="" type="checkbox"/> Eligible For A Substitute			
Job Status/Date	Terminated	2 / 1 / 2022	
Substitute Category			
Term Reason/Date	CHANGE IN CONTIBUT	2 / 1 / 2022	
Pay Period	Monthly		
Job Location	0050	CULLMAN CITY PRIMARY SCHOOL	
Replace Emp #	0		

When moving to a new position, create a new job!

3. Select Term Reason for the position for RSA purposes

4. Add new job using job type Primary
5. The Active Status should be the date the job began
6. Employment Date can be board hire date
7. Add the new salary schedule
8. Add/update

Job Number  Employee Type

Job Type  TEACHER 9M

Employment Date

Service Date

☒ Eligible For A Substitute

Job Status/Date

Substitute Category

Pay Period

Job Location  WEST ELEMENTARY SC

Replace Emp #

[Show All Jobs](#)

Salary Schedule Information

Anniversary Date

Code-Rank-Step  Percent

[Add/Update Item](#)

Sal Sch	Descr...	Percent
T9 - B - 0	TEAC...	100%

☒ Print On Service Report

☐ Paid in Full

[Add/Update Item](#)

[➔](#) [➔](#)

Employee Type			
Job	Type	Description	Status
1	TA7	TEACHER AIDE 7HRS	Terminated
2	SP	SUPPLEMENT - ATHLETIC / A...	Active
3	T9	TEACHER 9M	Active
60	NP	NONPENS LUMP SUM STIPE...	Active
63	EP	EXTRA PAY	Active



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# Add the Leave

Job Number  Employee Type: T9 TEACHER 9M Job Status: Active

Leave Information

Leave Yr  Leave Type  Leave Units: Day

Allowed  Max at EOY  Accrual Date  ☒ Active

Beg. Bal.  Accrued YTD  Taken YTD  Balance

T...	Description	All...	Beg Bal	Accrued	Taken	Max.	Ba...	Active	Acc. Date	Adjus...
1	SICK	9.00	0.00	0.00	0.00	999...	0.00	Yes	01/17/2022	0.00
2	PERSONAL	5.00	0.00	0.00	0.00	5.00	0.00	Yes	01/17/2022	0.00



# Add the GL

# Add a Comment

Current Form Document

Job Number  Employee Type:

Fiscal Year

G/L Acct

INSTRUCTION-TEACHER

Current Percent  Budget Total

Current Amount  ETE

FYTD Total





Type	T	Certified - Cullman Experience	Add/Update Experience	
<input checked="" type="checkbox"/> Beginning Date	01/2022	<input type="checkbox"/> Thru Date	Years	0
			Months	0
Job Title			<input checked="" type="checkbox"/> Experience Verified	
Supervisor			Contract Days	92.00
			Standard Contract Days	188
Previous Employer Data				

Change/Add Experience when changing positions, if necessary

On Personnel Data, may be necessary to change Certified Code and/or tenure information

<input checked="" type="checkbox"/> Tenure Date	7 /30/2010	Tenure Code	2
Certified Code	C	Certified	

# Move Leave from Term Job to New Job

Payroll	Employee Maint Audit Trail	PR	EMAT
PR Setup	Test Compute for An Employee	PR	TCIE
Employee Maintenance	Mass Change Deduction	PR	CSDA
PR Check Processing	Mass Change Deduction Status	PR	CSSD
Monthly Procedures	Mass Change GL Distribution	PR	CFEG
Quarterly Procedures	Mass Change Employee Jobs	PR	CCDE
Calendar YE Procedures	Input Leave Adj to History	PR	ILVA
Fiscal YE Procedures	Employee Leave Allocation	PR	ELAL
Miscellaneous Procedures	Move Job Leave/Pay Data	PR	MVLV
Payroll Site Specific			
Remote PR			

Add the selected Jobs

Select only:

Copy Fringe

Inactivate

Copy Leave

Inactivate

Employee #  Calendar Year

Job  
From Job #  To Job #

☐ Copy Job and Pay Record Data  
☐ Create To Job If Doesn't Exist  
☐ Terminate From Job  
Term Code

Salary Schedule  
☐ Copy Salary Schedules

GL Distribution  
☐ Copy G/L Distribution Data  
Fiscal Yr

Fringe  
☒ Copy Fringe Benefit Data  
☒ Inactivate From Job Fringe Benefit Data

Deduction  
☐ Copy Deduction Data  
☐ Inactivate From Job Deduction Data

Employer Paid  
☐ Copy Employer Paid Benefit Data

Leave  
☒ Copy Leave Data  
Leave Yr   
☒ Inactivate From Job Leave Data

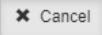
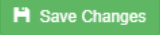
# PEEHIP Portal

Current Tier/Group:	Tier 2
Employer: *	TCMN - CULLMAN CITY BOE
Retirement Plan: *	TRS T2 CONT Regular
Contribution Group: *	Contributing Teacher
Position Status: *	Regular
Scheduled Units Effective Date: *	2/1/2022
Scheduled Units to Work per week: *	5.00
Scheduled Type of Units Worked: *	Days
Scheduled Full Time Units per week: *	5.00
Payroll Frequency: *	Monthly
Units Annually Contracted to Work: *	188
Number of Months Paid: *	12
Enrollment Begin Date: *	2/1/2022
Enrollment End Date:	
Enrollment End Reason:	Select Enrollment End Reason
LOA Status Effective Date: *	2/1/2022
LOA Status: *	Not on Unpaid Leave

**ALWAYS  
ADD THE  
NEW  
POSITION  
FIRST**

**THEN PUT AN  
ENROLLMENT  
END DATE  
ON THE  
EXISTING  
POSITION**

Current Tier/Group:	Tier 2
Employer: *	TCMN - CULLMAN CITY BOE
Retirement Plan: *	TRS T2 CONT Regular
Contribution Group: *	Contributing Other - Support Worker
Position Status: *	Regular
Scheduled Units Effective Date: *	02/01/2019
Scheduled Units to Work per week: *	37.50
Scheduled Type of Units Worked: *	Hours
Scheduled Full Time Units per week: *	37.50
Payroll Frequency: *	Monthly
Units Annually Contracted to Work: *	1225
Number of Months Paid: *	12
Enrollment Begin Date: *	02/01/2019
Enrollment End Date:	1/31/2022
Enrollment End Reason:	Change in Contrib Group
LOA Status Effective Date: *	02/01/2019
LOA Status: *	Not on Unpaid Leave

# Terminating Employees

Job Number	2	Employee Type: T9	TEACHER 9M
Contract Days	188.00	State Salary Unit	0.00
Percent Worked	100%	State Based Salary	0.00
Annual Salary	61,086.00	Full Time Earnings	5,090.50
Salaries Periods	12	Summer Pay Flag	
Pay Period Salary	5,090.50	<input checked="" type="checkbox"/> Include Job in LEAPS Reporting	
Hourly/Daily Code	D	<input checked="" type="checkbox"/> Use Pay Dates	<input checked="" type="checkbox"/> Use End Pay Date
Hours Per Day	7.50	1 / 1 / 2022	Thru 9 / 1 / 2022
Rate of Pay	324.93	<input type="checkbox"/> Use Contract Dates	1 / 1 / 1900 Thru 1 / 1 / 1900
Overtime Rate	487.40	<input type="checkbox"/> Calculate Salaries	
Accrual Days	24.33		

Total of All Active Jobs  
Annual: 61,086.00  
Monthly: 5,090.50

Use the End Pay Date feature when employee terminates at the end of the school year

The job will continue to pay until AFTER the date entered

It will not terminated the record.



# Peehip Portal

Enter the Enrollment End Date in the PEEHIP Portal

The date will be the last day the employee works

Note: Anything after the 16<sup>th</sup> of the month will earn the employee that month.

Current Tier/Group:	Tier 2
Employer: *	TCMN - CULLMAN CITY BOE
Retirement Plan: *	TRS T2 CONT Regular
Contribution Group: *	Contributing Other - Support Worker
Position Status: *	Regular
Scheduled Units Effective Date: *	02/01/2019
Scheduled Units to Work per week: *	37.50
Scheduled Type of Units Worked: *	Hours
Scheduled Full Time Units per week: *	37.50
Payroll Frequency: *	Monthly
Units Annually Contracted to Work: *	1225
Number of Months Paid: *	12
Enrollment Begin Date: *	02/01/2019
Enrollment End Date:	5/27/2022
Enrollment End Reason:	Voluntary Termination
LOA Status Effective Date: *	02/01/2019
LOA Status: *	Not on Unpaid Leave

✕ Cancel💾 Save Changes



## Use the Personnel Data Screen to terminate an employee from the system

Gender  Female  
Birth Date   
Ethnicity  WHITE  
Marital Status  Married  
Retirement Years   
Person Status   
Original Hire Date

Terminate Employee

Termination Date   
Termination Reason   
   
Enter Data and Click Okay to Accept  
Click Cancel to Abort

Terminate Employee

Do You Want to Terminate Employee Record?

Terminate Jobs

Do You Want To Terminate All Jobs?

Gender  Female  
Birth Date   
Ethnicity  WHITE  
Marital Status  Married  
Retirement Years   
Person Status   
Original Hire Date   
Term Code/Date

Inactivate Employee Level Deductions

Change Status of All Employee Level Deductions to Inactive?

Inactivate All Job Level Deductions

Change Status of All Associated Deductions to Inactive

Answering  
NO to these  
two  
questions  
will still  
allow you to  
terminate



# Mid-Year Salary Changes

- Higher Degree Change
  - Increase should occur only when the State Department has recognized the higher degree
  - Date of change in degree varies with each school system
    - Degree conferred
    - Acknowledge date of State Department
  - Does your board policy say that the increase must be board approved?
- Job Change
  - Different Hours
  - Different Position
  - Different Salary Schedule



# High Degree Calculation

Dates worked with current degree

Dates worked with new degree

	48505	188	258.005319	BA
	55782	188	296.712766	MA
	Days Worked	Daily Rate		
8/5-12/9/21	84	258.01	21,672.45	
12/10-5/27/22	104	296.71	30,858.13	
	188			
	Total Salary for 2021-2022		52,530.57	
	Already Paid			
	July		0.00	
	August		-3,731.15	
	September		-3,731.15	
	oct		-3,731.15	
	nov		-3,731.15	
	dec		-3,731.15	
	jan		0.00	
	feb		0.00	
	mar		0.00	
	april		0.00	
	Already paid		-18,655.75	
	Amount Owed	33,874.82		
	Div by remaining months	7.00		
	Jan through August			
	New Pay Period Salary	4,839.26		

Current Salary / Daily Rate

New Salary / Daily Rate

Use contract calendar to add up days

Total Salary for year will be prorated with both degrees

Total paid this contract year, Subtracted from Total Salary, Equals Amount Owed



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# Payroll Changes for Higher Degree

College 999 Unknown College

Degree 2 MASTERS DEGREE

☒ Highest Degree Earned

Education Data: Change to new degree and change the High Degree Earned

Code	Rank	Step	Code	Rank	Step	Add 1 to Step at Year End		Supp. Amount	Supp. Percent
T9	TEACHER - 188 DAYS	A	3	Yes				0.00	0%
T9	TEACHER - 188 DAYS	B	3	Yes				0.00	0%

Salary Schedule Information

Anniversary Date 8 /13/2014

Code-Rank-Step            Percent            Add/Update Item

Sal Sch	Descr...	Percent
T9 - A - 3	TEAC...	100%

☒ Print On Service Report Add/Update Item

☐ Paid in Full 1 / 1 /1900 ➡ ⬅

Add new salary schedule to Job Record

Add/Update

Add the new salary schedule to the salary schedule screen.

NOTE: Step should remain the same

Delete old schedule, optional

# Job Pay Data

Job Number	3	Employee Type: T9	TEACHER 9M
Contract Days	188.00	State Salary Unit	0.00
Percent Worked	100%	State Based Salary	0.00
Annual Salary	55,782.00	Full Time Earnings	4,648.50
Salared Periods	12	Summer Pay Flag	
Pay Period Salary	4,648.50	<input checked="" type="checkbox"/> Include Job in LEAPS Reporting	
Hourly/Daily Code	D	<input type="checkbox"/> Use Pay Dates	<input type="checkbox"/> Use End I
Hours Per Day	7.50	5 / 1 / 2022	Thru 5 / 1 / 2022
Rate of Pay	296.71	<input type="checkbox"/> Use Contract Dates	
Overtime Rate	445.07	1 / 1 / 1900	Thru 1 / 1 / 1900
Accrual Days	24.33	<input type="checkbox"/> Calculate Salaries	

Once Job Record has been updated, Calculate Salaries on the Pay Data screen using the Salary Schedule

\*Answer NO to the question

Salary will update to the new annual, pay period, rate of pay, and OT

Manually change the Pay Period Salary to the calculated amount on the Higher Degree Calculation

Pay Period Salary	4,839.26
-------------------	----------

## Add a Comment

Current Form	Document		
Employee Data		➡	⬅
Comments			

# Calculating Payoffs

- Same concept as Higher Degree
- Get the daily rate based on the salary divided by contract days
- Daily Rate times number of days work = Total Salary
  - If Sick Bank is owed, they are subtracted from Total Salary
- Add together what was already paid since beginning of contract year
- Subtract Total Paid from the Total Salary giving the
- Contract Payoff Amount
- PEEHIP coverage



2021-2022			
<b>Contract Payoff</b>			
Name:			
Number:		CTR:	
Position:			
<b>PAY OFF:</b>	<b>\$3,460.39</b>	<b>on</b>	<b>2/28/2022</b>
Salary Schedule	L5-00-10		
Full Contract	\$ 18,903.00		
Contracted Days	183	Peehip Coverage Ends:	4/30/2022
Daily Rate	\$ 103.30		
Last Day	2/24/2022		
# of Days Worked	125		
<b>Salary Calculation</b>			
Salary for 125 days at daily rate of \$103.30	\$ 12,911.89		
Cost of Days Owed to Sick Bank	\$ -	0 Days	
<b>Total Amount Due</b>	<b>\$ 12,911.89</b>		
Previously Paid			
SEPT	\$ 1,575.25		
OCT	\$ 1,575.25		
NOV	\$ 1,575.25		
DEC	\$ 1,575.25		
JAN	\$ 1,575.25		
FEB	\$ 1,575.25		
<b>Total Paid</b>	<b>\$ 9,451.50</b>		
<b>Contract Payoff</b>	<b>\$ 3,460.39</b>	<b>2/28/2022</b>	
PEEHIP DEDUCTION	\$ 545.00		
DUES	\$ -		
CSFO SIGNATURE	Board FHP	\$ 500.00	DATE

Create employee type for Contract Payoff and use RSA payment reason Contract Payoff (03)  
 RSA upload must contain a regular pay line, it won't accept just a contract payoff  
 Regular job will have monthly amount, Contract Payoff Job will contain payoff calculation

## Two Options for adding Payoff Amount

1. Leave		2. Hourly/Daily		3. Pay Adjust		4. Ex Su	
Date	Adj. Code	Adj. Amt	# of Days				
4 / 30 / 2022	PO	3460.39	1.00	Add	PAY OFF		
Date	Adj. Code	Adj. Amt	Adj Units	Reason			

Adding an adjustment to  
 their Contract Payoff Job in  
 Input Pay



Adding the payoff  
 calculation to the  
 Pay Period Salary on  
 the Pay Record  
 Screen of Contract  
 Payoff Job.

NOTE: Use End Pay  
 Date!

Job Number 10		Employee Type: CP		CONTRACT PAYOFF		Total of All Activ	
Contract Days	0.00	State Salary Unit	0.00	Annual:	61,1	Monthly:	0.00
Percent Worked	100%	State Based Salary	0.00				
Annual Salary	0.00	Full Time Earnings	0.00				
Salaried Periods	12	Summer Pay Flag					
Pay Period Salary	3,460.39	<input type="checkbox"/> Include Job in LEAPS Reporting					
Hourly/Daily Code	D	<input checked="" type="checkbox"/> Use Pay Dates		<input checked="" type="checkbox"/> Use End Pay Date			
Hours Per Day	0.00	5 / 1 / 2022	Thru	6 / 1 / 2022			
Rate of Pay	0.00	<input type="checkbox"/> Use Contract Dates					
Overtime Rate	0.00	5 / 1 / 2022	Thru	5 / 1 / 2022			
Accrual Days	0.00	<input type="checkbox"/> Calculate Salaries					



# Payroll Change for Payoffs

1. Add New Job called Contract Payoff  
RSA has code for Payoff

Job Number  Employee Type

Job Type  CONTRACT PAYOFF

Employment Date

Service Date

☐ Eligible For A Substitute

Job Status/Date

Substitute Category

Pay Period

Job Location  OTHER CENTRAL SUPPORT C.C.70

Replace Emp #

2. Leave Zero PPSalary OR enter Payoff Calculation

Job Number  Employee Type: CP CONTRACT PAYOFF

Contract Days  State Salary Unit

Percent Worked  State Based Salary

Annual Salary  Full Time Earnings

Salaried Periods  Summer Pay Flag

Pay Period Salary  ☐ Include Job in LEAPS Reporting

Hourly/Daily Code  ☐ Use Pay Dates ☐ Use End Pay Date

Hours Per Day   Thru

Rate of Pay  ☐ Use Contract Dates

Overtime Rate   Thru

☐ Calculate Salaries

Job Status: Active  
Exempt From

- ☐ 1. Federal Tax
- ☐ 2. State Tax
- ☐ 3. Social Security
- ☐ 4. Medicare
- ☐ 5. City Tax
- ☐ 6. County Tax
- ☐ 7. Retirement
- ☐ 8. SUI
- ☐ 9. Worker's Comp
- ☐ Matching Insurance

Total of All Active Jobs  
Annual: 61,198.00  
Monthly: 5,099.83

3. End Pay Date if payoff calculation as PPSalary

☒ Use Pay Dates ☒ Use End Pay Date

Thru

☐ Use Contract Dates

4. Copy GL from Primary Job to Payoff Job

Job Number  Employee Type:

Fiscal Year

G/L Acct

GEN EXEC ADM SERV-SECRETARY

Current Percent  Budget Total

Current Amount  ETE

FYTD Total

# Things to Remember:

- If leave runs in arrears, then you will need to enter days out in Leave Adjustment
  - Be careful if there is a sub that is attached
- Terminate the employee the next month
  - Put their term letter in next months payroll folder to remind you
- PEEHIP Adjustment
  - Deduction Adjustment Module
  - PEEHIP Correction/Adjustment
  - Next months PEEHIP invoice will show deduction
- PEEHIP Check for future invoices
  - Invoice employee
  - Deduction Payment and Vendor Check
    - Activate employee, job, and deduction



# Fringe Benefits

- “A fringe benefit is a form of pay for the performance of services”
  - IRS Publication 15-B reviews types of fringe benefits
  - Taxable vs Non-Taxable
- Group Life Insurance
- Vehicle
- Athletic Facilities/Gym Memberships
  - Exclusion if employee’s use an on-premise gym
- Fringe calculation
  - Monthly
  - End of Calendar Year (December)
  - Beginning of Calendar Year (January)
- Clear fringe Benefits
  - Checking and unchecking the Clear Fringe Benefits box in parameters



# Fringe Benefits Parameters

## PR Parameter Maintenance I

Installation ID **Cenoff**

6. Summer Pay  
1.Site

7. Sick Bank  
2. Posting

8. Leave  
3. **Ins/GTL**

Group Term Life

Additional Term Life15,000.00

Employer Paid Amount0.00

Employer Paid Percent0%

Taxable Cutoff50,000.00

Insurance

☐ Calculate

Maximum

Minimum

Cove

Installation ID **Cenoff**

1.Site

2. Posting

3. Ins/GTL

4. Retire/Comp

5. Third Party Sys

6. Summer Pay

7. Sick Bank

8. Leave

9. Emp Mnt/Pr Proc

10. **Other**

Federal Minimum Wage7.25

Max Paid Leave Days0.00

Default Substitute Rate75.00

Scholastic Begin Month/Day71

Employer Paid Benefits

☒ Withhold Federal Tax From Fringe Benefits

☐ Withhold State Tax From Fringe Benefits

☐ Clear Fringe Benefit After Update

☐ Use Pay Class Code

☒ Post Input Pay by Day

☐ Allow Update To Live From Budget Work

☒ Limit Total Garnishments to Percent25%

## Payroll Code Maintenance III

Codes6. **Group Term Life**

Age Minimum25

Age Maximum29

Monthly Cost Per \$10000.06

# Payroll Code Maintenance II

h Code	6. Fringe Benefit Type	7. Input Pa
Fringe Benefit Type <input type="text" value="L"/>		
Fringe Benefit Type Description GTL FRINGE BENEFIT		
W2 Code <input type="text" value="5"/> Group Life Fringe Benefit		
<input checked="" type="checkbox"/> Life Insurance Benefit		

Fringe Benefit Type	<input type="text" value="V"/>
Fringe Benefit Type Description	VEHICLE FRINGE BENEFIT
W2 Code	<input type="text" value="V"/> Vehicle Fringe Benefit
<input type="checkbox"/> Life Insurance Benefit	



# Calculate Taxable Fringe Benefit

Effective Date	<input type="text" value="12/31/2022"/>	Employment Date	<input type="text" value="10/01/2020"/>
Scholastic Year	<input type="text" value="2021"/>	07/01/2020 Thru 06/30/2021	
<input checked="" type="checkbox"/> Update Fringe Benefit		<input type="checkbox"/> Calculate Amount	
<input type="radio"/> Replace Amount		<input type="radio"/> Pay Period	
<input type="radio"/> Accumulate Amount		<input type="radio"/> Annual	
		<input type="radio"/> Other	Months <input type="text"/>

Effective date depends on when calculated:

End of new year for January calculation (Pay Period)

End of current year for December calculation (Annual)

Employment Date:

Hired before this date will not be calculated

Scholastic year:

Always the previous scholastic year as current

## ☐ Update Fringe Benefit

Run the report without "Update Fringe Benefit" selected to review the report prior to updating records

# Understanding the Fringe Benefit Report

MCAI PAYROLL SYSTEM LIFE INSURANCE FRINGE BENEFIT REPORT REPORT ONLY CULLMAN CITY BOARD OF EDUCATION							PAY PERIOD
<u>E</u>	<u>EMPLOYED</u>	<u>BIRTHDAY</u>	<u>Age</u>	<u>JOB</u>	<u>INSURANCE AMT</u>	<u>TAXABLE UNITS</u>	<u>FRINGE BEN</u>
ANNETTE	08/03/2017	08/24/1991	31	1	34,526.15	0.00	0.00
RYAUGUST	08/09/2011	03/30/1978	44	1	65,316.66	15.00	1.50
AREN S	05/25/2018	10/13/1958	64	1	42,437.16	0.00	0.00
ERRY MARCUS	07/22/2019	01/03/1959	63	1	42,980.60	0.00	0.00
ETH	08/14/2012	06/02/1990	32	1	69,852.50	20.00	1.60
RA S	09/20/2005	08/21/1962	60	1	36,312.21	0.00	0.00
IM	08/16/1991	09/13/1967	55	1	93,732.44	44.00	18.92



Age Minimum

Age Maximum

Monthly Cost Per \$1000

- Amount over \$50,000 is the taxable amount (rounded)
- The taxable amount (units) are then multiplied by the cost per \$1,000 based on the employee's age
- A 44 year old has a .10 cost per \$1,000 for 15 unit making her monthly fringe amount for the year \$1.50 (15 x .10)
- If reporting by Annual amount, the amount would be \$18 for the year (1.50 x 12)



## PR Parameter Maintenance I

3. Ins/GTL	4. Retire/Comp	5. Third Party Sys
8. Leave	9. Emp Mnt/Pr Proc	10. Other

- ☒ Withhold Federal Tax From Fringe Benefits
- ☐ Withhold State Tax From Fringe Benefits
- ☐ Clear Fringe Benefit After Update
- ☐ Use Pay Class Code
- ☒ Post Input Pay by Day
- ☐ Allow Update To Live From Budget Work
- ☒ Limit Total Garnishments to Percent

☐ Clear Fringe Benefit After Update

- ☐ If running fringe benefits in January for the new calendar year:
  - ☐ CHECK THIS BOX IN DECEMBER
  - ☐ UNCHECK THE BOX IN FEBRUARY
  
- ☐ If running fringe benefits in December for the past calendar year:
  - ☐ CHECK THIS BOX IN JANUARY
  - ☐ UNCHECK THE BOX IN DECEMBER



# Leave Initialization

MCAT	Application or Transaction Name	Ap	Tran
Budget Work	Employee Leave Detail Report	PR	ELTD
Human Resources	Employee Leave Initialization	PR	ELIN
Payroll	Employee Leave Allocation	PR	ELAL
PR Setup	Add 1 to/Inc Salary Sch Years	PR	ADD1
Employee Maintenance	Fiscal Year End Reorganization	PR	FYER
PR Check Processing	Reset % in Employee GL Dist	PR	RPGL
Monthly Procedures	Compensated Absences Report	PR	CABR
Quarterly Procedures	Annual Retirement Withheld Rpt	PR	ARWR
Calendar YE Procedures			
Fiscal YE Procedures			
Miscellaneous Procedures			
Payroll Site Specific			
Remote PR			
System Control			

- Completed in July for most districts
  - Few have vacation done separately
- Rolls leave to the new leave year based on Leave Parameter
- Personal/Vacation days in June
  - Used it or lose it?
  - Leave Adjust to History



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# Leave Maintenance

Where?

PR/LVCM: Payroll Leave Code Maintenance (v3.04)

1. Category 2. Type Code 3. Business Code 4. Business Rule 5. Empl Type

Leave Type Code 1 Leave Description SICK

Overriding Sub Comp Object Value 180

SUBSTITUTES

Category Code Leave Type to Adjust Default Adjustment Code

Roll into 1st Type 1 Roll into 2nd Type Third Party Leave Type 1

☐ Sick Bank ☒ Print Leave Bal on Check Stub Advance Leave Method  
☐ Comp Time ☐ Advance Allowed  
☐ Include in Accrual Cutoff Calc. ☐ Allow Negative Balance ☒ Advance Thru EOY  
☒ Advance One Unit

Inquire Mode: Enter the Key Word for the Desired Record

Different Types

How?

1. Category 2. Type Code 3. Business Code 4. Business Rule 5. Empl Type

Leave Business Code SCKDY9

Description Sick Days- 9 month employees

Unit of Measure D

☐ Leave Accrual By Years of Service  
☐ Max Balance Applies to EOY Only  
☐ Accrue Every Month

Hourly Accrue Leave Flag Accrual Flag Accrual Cut Off Flag

☐ Work Hours Per Day ☒ Accrue at End of Month ☒ If Employee Works at All  
☐ Calculate Monthly Accrual ☐ Accrue Portion at Each Payroll ☐ If Employee Works Half  
☐ Accrue Annually

How much?

1. Category 2. Type Code 3. Business Code 4. Business Rule 5. Empl Type

Leave Business Code SCKDY9 Sick Days- 9 month employees

From Years Up To Years Units to Accrue Annual Allowed Max to Take YTD Max Balance at EOY Max Paid Leave Units Max To Take w/o Dock

Lv Bus Code	From # Years	Up To Years	Accr
PERDY	0	99	
SBPLV	0	999	
SCKBNK	0	99	
SCKDY	0	999	
SCKDY0	0	999	
SCKDY1	0	99	
SCKDY9	0	999	
UPDLV	0	999	
VACCFO	0	99	

Who?

1. Category 2. Type Code 3. Business Code 4. Business Rule 5. Empl Type

Leave Type 1 SICK

Leave Business Code SCKDY9 Sick Days- 9 month employees

Employee Types

Type	Description
<input type="checkbox"/> 12NS	Salaried Support
<input checked="" type="checkbox"/> 9NS	Salaried Support
<input type="checkbox"/> A1	SUPERINTENDE
<input type="checkbox"/> AD	ADMINISTRATOF
<input type="checkbox"/> ADSP	ADMIN SUPPLEI
<input type="checkbox"/> AP	ASSISTANT PRI
<input checked="" type="checkbox"/> BD	BUS DRIVER/AIC
<input type="checkbox"/> C0	CLERICAL 10M 8

GL Parameters (Optional)

Sub GL Comp Name Object

Sub GL Comp Value 180

# Employee Type Maintenance

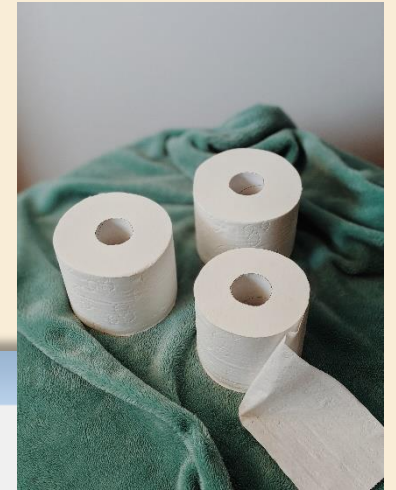
2. Leave Information			3. Mandatory Ded		
40 / 7.5	Empl ...	Lv ...	Lv Bus ...	Sub GL C...	Sub GL Co.. ^
	T0	SB	SCKBNK	Object	180
	T1	1	SCKDY1	Object	180
	T1	2	PERDY	Object	180
	T1	SB	SCKBNK	Object	180
	T189	1	SCKDY9	Object	180
	T189	2	PERDY	Object	180
	T189	SB	SCKBNK	Object	180
	T2	1	SCKDY	Object	180
	T2	2	PERDY	Object	180
	T2	3	VACDY	Object	180
	T2	SB	SCKBNK	Object	180

**CONSISTENCY  
IS THE  
BUILDING BLOCK  
OF TRUST**

- When setting up a new employee type, Tab 2 allows you to enter the Leave Code that applies to the new type
- Verify leave attached to types
  - Consistency



# Employee Leave Initialization



Next year for leave year

Date that leave is effective: Normally 7/1

Selected leave types should be anything that rolls:

Sick

Personal

Vacation

Sick Bank

?

PR/ELIN: Employee Leave Init (v3.18)

New Leave Year 2023

Effective Leave Date 7 / 1 / 2022

☒ Review Proposed Changes and Exceptions Only

☐ Initialize New Year and Generate Report

Leave Types		Job Status Codes		Job Location		Employee Type	
Code	Description	Code	Description	Code	Description	Code	Description
<input checked="" type="checkbox"/> 1	SICK	<input checked="" type="checkbox"/> A	Active	<input checked="" type="checkbox"/> 00...	Default CCTR Valu	<input checked="" type="checkbox"/> 12NS	Salaried Support
<input checked="" type="checkbox"/> 2	PERSONAL	<input type="checkbox"/> L	On Leave	<input checked="" type="checkbox"/> 00...	SUBSTITUTES	<input checked="" type="checkbox"/> 9NS	Salaried Support
<input checked="" type="checkbox"/> 3	VACATION	<input type="checkbox"/> P	Applicant	<input checked="" type="checkbox"/> 00...	CULLMAN MIDDLE	<input checked="" type="checkbox"/> A1	SUPERINTENDE
<input type="checkbox"/> 4	UNPAID	<input type="checkbox"/> R	Retiree Substitute	<input checked="" type="checkbox"/> 00...	LUNCHROOM - CL	<input checked="" type="checkbox"/> AD	ADMINISTRATOR
<input type="checkbox"/> 5	Covid FFCRA	<input type="checkbox"/> S	Substitute	<input checked="" type="checkbox"/> 00...	CULLMAN HIGH S	<input checked="" type="checkbox"/> ADSP	ADMIN SUPPLE

☐ Only Get Primary Jobs ☐ Only Get if Job is Printing on the Service Report

Report Destination

☐ To Printer HP Color LaserJet Pro M479fdw (redirected)

☒ To Report Viewer

☐ To File

Setup

Enter Selection Criteria, Click Enter(F1) To Generate Report



# Verify Results

1	2	3	4	5	6	7	8	9								
Proposed Changes and Exceptions (in Red)																
J...	L...	LvDe...	Accr...	2021 ...	Adjust...	Amt I...	Roll...	Amt In...	RollIn...	2022 ...	Units2...	2022 A...	Adjus...	2022 ...	Max ...	Except^
1	1	SICK	No	251	251	255.5	1	0		255.5	0	0	0	255.5	999	
1	2	PER...	Yes	4.5	4.5	4.5	1	0		0	5	5	0	5	5	
1	SB	SICK...	No	2	2	2	SB	0		2	0	0	0	2	999	
1	1	SICK	No	84.6	84.6	87.27	1	0		87.27	0	0	0	87.27	999	
1	2	PER...	Yes	2.67	2.67	2.67	1	0		0	5	5	0	5	5	
1	SB	SICK...	No	2	2	2	SB	0		2	0	0	0	2	999	
1	1	SICK	No	188.25	188.25	193.25	1	0		193.25	0	0	0	193.25	999	
1	2	PER...	Yes	5	5	5	1	0		0	5	5	0	5	5	
1	3	VAC...	No	16	16	16	3	0		16	0	0	0	16	99	
1	1	SICK	No	45.13	45.13	49.13	1	0		49.13	0	0	0	49.13	999	

1. Leave Type
2. Accrue Annually?
3. Current Leave Balance
4. Amount to Roll
5. Rolling to....



6. Beginning Balance of New Year
7. Annual Accrual Amount
8. New Year Leave BALANCE
9. Exceptions:  
Sick Bank Applied

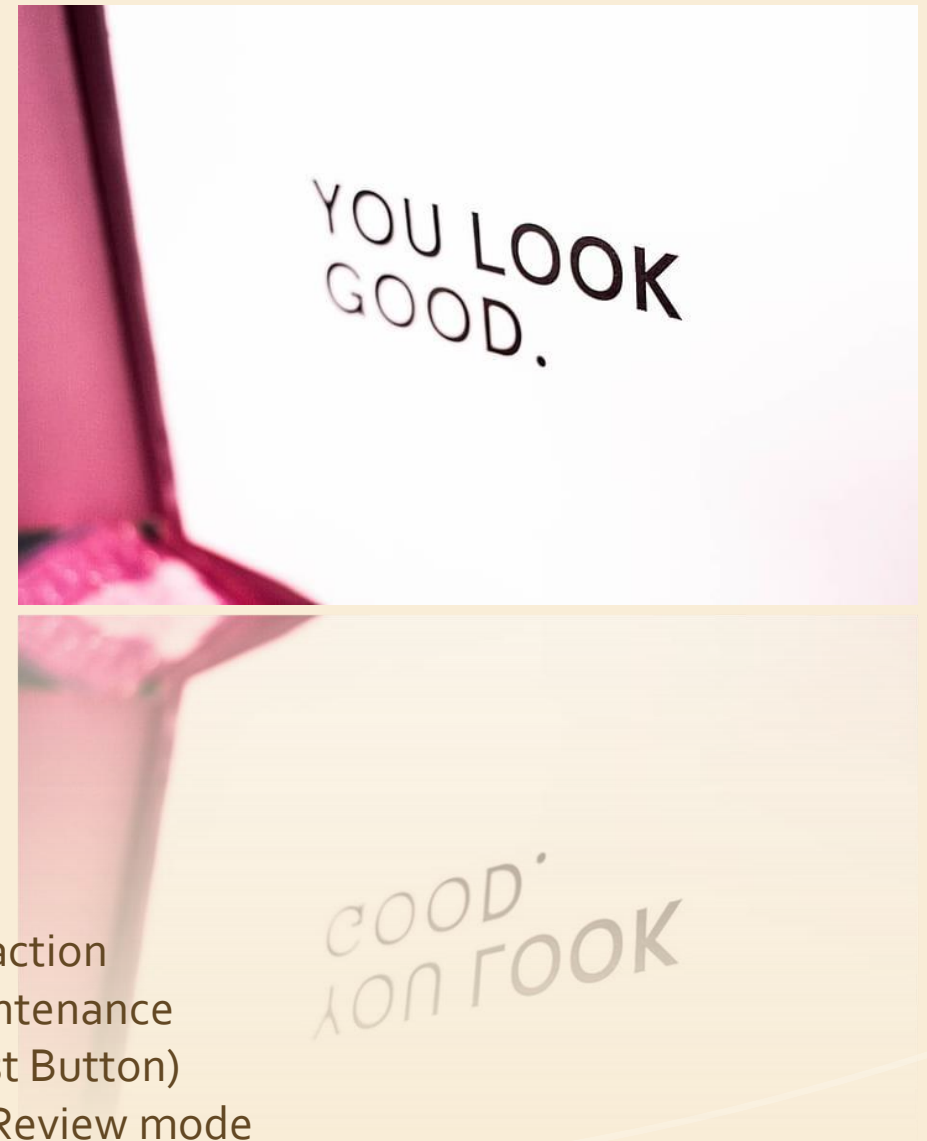


- If results are correct, close sheet and select the “Initialize New Year...” button
- When the report is run, the same results will show
- Select SAVE and new leave records will be pushed out to the employees
- A report will show on screen when complete
  - Reports only shows employee number, not name

- Review Proposed Changes and Exceptions Only

- Initialize New Year and Generate Report

- If the results look incorrect, exit the transaction
- Correct the error in parameters or EE Maintenance
- Run the Leave Initialization again (use Last Button)
  - Can run as many times as needed in Review mode



Any  
Questions



Questions are the path to learning







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*Thank  
You*