

PAYROLL SETUP PROCEDURES

AASBO
February 11, 2020
Tuscaloosa, AL

Paula Thornton
Vestavia City Schools

NEW HIRE WORKSHEET

Entered In NextGen	Name	Effective Date	Position	Contract Days for 2017-2018	New Hire Portal	TRS Portal
266		8/7/2017	Ridge - Elem Teacher	187	x	x
288		6/19/2017	PHS Assist Principal	240	x	x
291		7/1/2017	PPMS - Custodian	240	x	x
292		7/1/2017	PHS - Guidance Counselor	240	x	x
289		7/1/2017	PHS - Custodian	240	x	x
276		7/1/2017	PHS - Custodian	240	x	x
290		7/1/2017	PPMS - Custodian	240	x	x
305		7/1/2017	PHS - Custodian	240	x	x
302		8/7/2017	PHS - Guidance Counselor	240	x	x
341		8/7/2017	PHS Sp Ed Teacher	187	x	x
317		8/1/2017	PHS - CNP Mgr	188	x	x
323		8/7/2017	PHS - ELA Teacher	187	x	x

E-Verify	Fingerprint	Tier I or II	13 Payment	Degree (for Pay)	Years of Exp	EXP Received	National Board Certified	Salary
x	x	Rehired	from	last	year	complet	complete	complete
x	x	1	NA	6th Year	13	13	No	\$78,498.00
x	x	2	NA	NA	1	1	No	\$27,904.80
x	x	1	NA	Master	21	21	No	\$72,296.00
x	x	1	NA	NA	0	0	No	\$25,958.00
x	x	2	NA	NA	0	0	No	\$25,958.00
x	x	2	NA	NA	0	0	No	\$25,958.00
x	x	1	NA	Master's	12	12	No	\$68,625.00
x	x	2	No	Master	2	2	No	\$44,449.02
x	x	2	No	NA	1	1	No	\$27,898.00
x	x	1	No	Master	14	14	No	\$53,470.56

Experience Data – Classified

The screenshot shows a software window titled "PR/EMNT Name: [redacted] HQ: Not Approved Cert Non-Certified (v3.87)". The window contains a form with the following fields: Employee # (5), Name (Last, First M) ([redacted]), SSN ([redacted]), Person Id (777), Current Form (Experience Data), and Document ([redacted]). Below the form is a table with the following data:

Type	Description	Yrs	Mns	Date Beg...	Date End...	Job Title	Verified
OTH	Support Experience	4	0	05/2014			1
OTH	Support Experience	19	0				1

The table has a "Show/Add Experience" button above it. The software interface includes a menu bar (File, Edit, Tools, Toolbar, Windows, Favorites, Help) and a toolbar with icons for Enter, Add Pers, Change, Mail, Save, Inquire, Next, Back, Clear, Search, PrtScr, and Exit. The Windows taskbar at the bottom shows the date "Tuesday 7/10/2018", the time "1:01 PM", and the system status "Employee Maintenance Ready to Execute".

This screen is for experience from a prior system.

This example shows experience for a classified employee. They transferred in 19 years and have been with the current system 4 years.

Experience Data – Certified

Employee # 9 Name (Last, First M) [REDACTED] SSN [REDACTED] Person Id 781 Current Form Experience Data Document [REDACTED]

Type	Description	Yrs	Mns	Date Beg...	Date End...	Job Title	Verified
ST	This State Experience	15	0	06/2014	06/2014		1
SYS	This System Experience	4	0	06/2014	06/2014		1

To add experience click Show/Add Experience

This screen shows a certified employee with 15 years previous experience and 4 years experience with the current system. Again, the Education Data screen and the Experience Data screen are **CRUCIAL** information for the LEAPS report (State funding).

Experience Data

Harris DSN: ngsqslvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

File Edit Tools Toolbar Windows Favorites Help

Enter Add Pers Change Mail Save Inquire Next Back Clear Search PrtScr Exit

PR/EMNT Name: [Redacted] Q: Not Approved Cert: Non-Certified (v3.87)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
5	[Redacted]	[Redacted]	777	Experience Data	[Redacted]

Type: [Dropdown]
 Beg OTH
PRV
Job Title: PUB
ST
SYS
Supervisor: [Redacted]
Contract Days: 0 Standard Contract Days: 0

Previous Employer Data
School/Employer Nam: [Redacted]
Address: [Redacted]
Reason for Leaving: [Redacted]
Zip: [Redacted]
Duties Performed: [Redacted]
Phone: [Redacted]

Show/Add Experience
Add/Update Experience (marked with a red star)
Comments

Years: 0 Months: 0

Wednesday 7/25/2018 Employee Maintenance Ready to Execute 10:41 AM

Select Show/Add Experience to add a record. For Type select from Drop Down box. Must enter at least Years and will add months if they worked a partial year. Some systems choose to enter all info. When finished click Add/Update Experience (see red star)

Salary Schedules

- ▶ The more jobs you can tie to a salary schedule the easier the budget will be for your CFO when using Budget Works.
 - ▶ If job is not tied to a salary schedule the CFO has to remember to add those
 - ▶ Specifically coaching supplements
- 

Salary Schedule

Harris DSN: ngsqslvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

PR/EMNT Name: [Redacted] HQ: Not Approved Cert: Non-Certified (v3.87)

Employee # 5 Name (Last, First M) [Redacted] SSN [Redacted] Person Id 777 Current Form Salary Schedules Document [Redacted]

Code Rank Step Code Rank Step Add 1 to Step at Year End

Supp. Amount Supp. Percent

Add/Update Item

Code	Description	Rank	Step	Add 1	% Code	% Rank	% Step
CO	Central Offic...	1		19	Yes		

PR/SSLK Salary Schedule Look Up

Salary Schedule Code To

Salary Schedule Rank To

Salary Schedule Step To

Sal S...	Sal Sch Desc	Rank ...	Rank Desc	Years...	St Base ...	Other Sal	Maximum
A4	Assistant Pr...	EA	Elementary ...	13	56,794.84	0.00	0.00
A4	Assistant Pr...	EA	Elementary ...	14	56,794.84	0.00	0.00
A4	Assistant Pr...	EA	Elementary ...	15	57,961.30	0.00	0.00
A4	Assistant Pr...	EA	Elementary ...	16	57,961.30	0.00	0.00
A4	Assistant Pr...	EA	Elementary ...	17	57,961.30	0.00	0.00

Search Clear Next 500 Previous 500 Exit

Received 2432 Records
Use the Next and Previous Buttons to Scroll Through the Check Batch Records
Click on the Salary Schedule You Want

Monday 8/6/2018 Employee Maintenance Performing Requested Operation 9:02 AM

You can search salary schedules to find the code, rank and step. After selecting or entering salary schedule click Add/Update Item. You can enter multiple salary schedules if they have multiple jobs (i.e. teacher and bus driver)

Suggestion: Make sure to have supplements (coaching, etc) set up on the salary schedule. If you do not have and you hand key the amount then it will not pull to budget works when CSFO starts to work on budget.

Multiple Salary Schedules

The screenshot shows a software application window titled "PR/EMNT Name: [redacted] HQ: Not Approved Cert: Certified (v3.87)". The window contains a form for employee information and a table of salary schedules.

Employee # 6, Name (Last, First M) [redacted], SSN [redacted], Person Id 778, Current Form Salary Schedules, Document [redacted]

Related Salary Sch Add 1 to Step at Year End

Code	Rank	Step	Code	Rank	Step	Supp. Amount	Supp. Percent	
S1			AL			4	Yes	% Code
SS			AL			0	Yes	% Rank
								% Step

Monday 8/6/2018 Employee Maintenance Ready to Execute 9:14 AM

Shows multiple salary schedules

Job Record Data

Harris DSN: ngsqslvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

PR/EMNT Name: [redacted] HQ: Not Approved Cert: Certified (v3.87)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
139	[redacted]	[redacted]	7338	Job Record Data	[redacted]

Job Number: 1 Employee Type: T

Job Type: Primary Job TEACHER (187 DAYS)

Employment Date: 1/2/2015

Service Date: 1/2/2015

Eligible For A Substitute

Job Status/Date: Active 1/2/2015

Substitute Category: [redacted]

Pay Period: Monthly

Job Location: 0085 PELHAM HIGH SCHOOL

Replace Emp #: 0

Salary Schedule Information

Anniversary Date: 1/2/2015

Code-Rank-Step	Percent
[redacted]	[redacted]

Add/Update Item

Job	Sal Sch	Desc...	Salary Sche...
1	G - AA - 24	9 MO...	2015092414...

Print On Service Report

Paid in Full 1/1/1900

Add/Update Item

Screen 1 of adding job record data. Enter a job number (I enter 1 for their primary job). Select Employee Type (can use drop down box to search if you do not know type). Select Job Type (primary, etc). Employment Date and Service Date should default. Select Job Status/Date. Pay Period should default and Job location should default. In the Salary Schedule Information box use drop down box to select salary schedule to use with this specific job. Enter the percent of that salary schedule to use (normally 100%). Then select Add/Update Item WITHIN that box (beside the percent). Then click Add/Update over the blue arrows.

Supplements

Employee receives 3% of current salary for supplement

Job Number Employee Type

Job Type SUPPLEMENT

Employment Date

Service Date

Eligible For A Substitute

Job Status/Date

Substitute Category

Pay Period

Job Location PMS

Replace Emp #

Salary Schedule Information

Anniversary Date

Code-Rank-Step Percent

Job	Sal Sch	Desc...	Salary Sche...
3	02 - 01 - 2	RAN...	2019061210...

Print On Service Report

Paid in Full

[Click On Job To View Detail](#)

Job Record Data

Harris DSN: ngsqslsvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

File Edit Tools Toolbar Windows Favorites Help

Enter Add Pers Change Mail Save Inquire Next Back Clear Search PrtScr Exit

PR/EMNT Name: [REDACTED] HQ: Not Approved Cert: Certified (v3.87)

Employee # 139 Name (Last, First M) [REDACTED] SSN [REDACTED] Person Id 7338 Current Form Job Record Data Document [REDACTED]

Employee Type Show/Add Job Detail

Job	Type	Description	Status	D...	Pay Code	Job Type
1	T	TEACHER (187 DAYS)	Active	P...	Monthly	Primary Job
70	SS	SUPPLEMENT	Active	P...	Monthly	Supplemental Job
75	SS	SUPPLEMENT	Terminated	P...	Monthly	Supplemental Job

Job Record Data screen after you Add/Update. This screen shows this employee is a teacher and receives a Board paid supplement. I use 70 for Board Paid supplements, 50 is for subs, 90 is Pay for unused Personal days. In previous years this employee also received a Booster paid supplement (#75) but did not this year so that one record is terminated. To terminate double click on the record and then change from active to terminated and follow prompts.

Me...

Monday 8/6/2018

Employee Maintenance Ready to Execute

9:41 AM



9:41 AM
8/6/2018

Job Pay Record

The screenshot shows a software application window titled "Job Pay Record" with a menu bar (File, Edit, Tools, Toolbar, Windows, Favorites, Help) and a toolbar with icons for Enter, Add Pers, Change, Mail, Save, Inquire, Next, Back, Clear, Search, PrtScr, and Exit. The window displays the following information:

PR/EMNT Name: [Redacted] SN: [Redacted] HQ: Not Approved Cert: Non-Certified (v3.85)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
5	[Redacted]	[Redacted]	777	Job Pay Record	[Redacted]

Job Number: [Redacted] Employee Type: PR [Redacted]

Contract Days: 240 State Salary Unit: 0.00 Total of All Active Jobs: Annual: 58,864.00 Monthly: 4,905.33

Percent Worked: 100% State Based Salary: 0.00

Annual Salary: 58,864.00 Full Time Earnings: 4,905.33

Salaried Periods: 12 Summer Pay Flag: [Redacted]

Pay Period Salary: 4,905.33

Hourly/Daily Code: H

Hours Per Day: 8.00

Rate of Pay: 30.66

Overtime Rate: 45.99

Accrual Days: 3.00

Include Job in LEAPS Reporting

Use Pay Dates Use End Pay Date

4/17/2018 Thru 4/17/2018

Use Contract Dates

4/17/2018 Thru 4/17/2018

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

The bottom of the window shows a taskbar with the date "Tuesday 4/17/2018", the text "Employee Maintenance Ready to Execute", and the time "8:19 AM".

After adding Job Record Data, this screen automatically populates. You will be prompted on whether or not to use the salary schedule that is attached.

Job Pay Record

The screenshot shows a software application window titled "Job Pay Record" with the following fields and settings:

- Employee #:** 5
- Name (Last, First M):** [Redacted]
- SSN:** [Redacted]
- Person Id:** 777
- Current Form:** Job Pay Record
- Document:** [Redacted]
- Job Number:** [Redacted]
- Employee Type:** PR
- Contract Days:** 240
- Percent Worked:** 100%
- Annual Salary:** 58,864.00
- Salaried Periods:** 12
- Pay Period Salary:** 4,905.33
- Hourly/Daily Code:** H
- Hours Per Day:** 8.00
- Rate of Pay:** 30.66
- Overtime Rate:** 45.99
- Accrual Days:** 3.00
- State Salary Unit:** 0.00
- State Based Salary:** 0.00
- Full Time Earnings:** 4,905.33
- Summer Pay Flag:** [Redacted]
- Total of All Active Jobs:** Annual: 58,864.00, Monthly: 4,905.33
- 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
- Include Job in LEAPS Reporting:**
- Use Pay Dates:** (highlighted with a red oval)
- Use End Pay Date:**
- Use Contract Dates:**
- Calculate Salaries:**

A blue star is placed below the "Use Pay Dates" checkbox.

If this is a new hire requesting 13 payments change salaried periods to 13 and select the Calculate Salaries box (above blue star). Also if you enter an employee in June but do not want to process a payment until September Select Use Pay Dates (see red oval).

Job Pay Record

The screenshot shows a software application window with the following content:

PR/EMNT Name: [redacted] SN: [redacted] HQ: Not Approved Cert: Non-Certified (v3.85)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
5	[redacted]	[redacted]	777	Job Pay Record	[redacted]

Job Number: [redacted] Employee Type: PR [redacted]

Contract Days: 240 State Salary Unit: 0.00 Total of All Active Jobs: Annual: 58,864.00 Monthly: 4,905.33

Percent Worked: 100% State Based Salary: 0.00

Annual Salary: 58,864.00 Full Time Earnings: 4,905.33

Salaried Periods: 12 Summer Pay Flag: [redacted]

Pay Period Salary: 4,905.33

Hourly/Daily Code: H

Hours Per Day: 8.00

Rate of Pay: 30.66

Overtime Rate: 45.99

Accrual Days: 3.00

Include Job in LEAPS Reporting

Use Pay Dates Use End Pay Date

4/17/2018 Thru 4/17/2018

Use Contract Dates

4/17/2018 Thru 4/17/2018

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

A blue star is placed over the 'Use Pay Dates' checkbox.

If this specific job is exempt from Retirement or Matching Insurance, etc. then select those boxes on the left side of the screen. (i.e. Teacher/bus driver but you want the entire Insurance Allocation to come from his teacher position then you would checkmark Matching Insurance on his bus driver job.

Job GL Distribution

Harris DSN: ngsqslvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

File Edit Tools Toolbar Windows Favorites Help

Enter Add Pers Change Mail Save Inquire Next Back Clear Search PrtScr Exit

PR/EMNT Name [REDACTED] HQ: Not Approved Cert: Non-Certified (v3.87)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
5	[REDACTED]	[REDACTED]	777	Job G/L Dist	[REDACTED]

Job Number: 1 Employee Type: PR PAYROLL MANAGER Job Status: Active
Fiscal Year: 2018 Show/Hide G/L Distribution
G/L Acct: 11-5-6310-133-8610-1110-0-8600-0000 Add/Update Item
FISCAL SERVICES, BOOKKEEPER
Current Percent: 100% Budget Total: 60,320.00
Current Amount: 0.00 ETE: 1.00
FYTD Total: 49,175.94

Monday 8/6/2018 Employee Maintenance Ready to Execute 11:12 AM

Enter the GL for this job. Enter the percent for this GL. Then enter the FTE. If it is 100% to one GL then the FTE is normally 1.00. The Budget total rolls in from Budget Works and is not required. After info is entered click Add/Update.

Multitple GL Codes

Harris DSN: ngsqslsvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

File Edit Tools Toolbar Windows Favorites Help

Enter Add Pers Change Mail Save Inquire Next Back Clear Search PrtScr Exit

PR/EMNT Name [REDACTED] HQ: Not Approved Cert: Non-Certified (v3.87)

Employee # 317 Name [REDACTED] SSN [REDACTED] Person Id 813 Current Form Job G/L Dist Document [REDACTED]

Job Number 1 Employee Type: SP C O SUPERVISOR Job Status: Active

Fiscal Year 2018 Show/Hide G/L Distribution

Job	Account Number	Year	Curr. %	Curr. Amt	Budget Tot	FYTD Tot
1	12-5-4210-111-0087-5101-0-8420-0000	20...	25%	0.00	0.00	2,210.28
1	12-5-4210-111-0085-5101-0-8420-0000	20...	25%	0.00	0.00	2,210.28
1	12-5-4210-111-0155-5101-0-8420-0000	20...	25%	0.00	0.00	2,210.28
1	12-5-4210-172-0085-5101-0-8420-0000	20...	0%	0.00	0.00	23,248.50
1	11-5-1100-199-8100-6001-0-8100-0000	20...	0%	0.00	0.00	250.00
1	12-5-4210-111-0150-5101-0-8420-0000	20...	25%	0.00	0.00	2,210.27

Total Budget: \$0.00 Total FYTD Amt: \$32,339.61

This example shows an employee whose salary is divided evenly between four cost centers.

The % must total 100 before you can update this screen

Harris DSN: ngsqsvr Install ID: Cenoff (PELHAM CITY SCHOOL SYSTEM) User: pthornton (PAULA THORNTON)

File Edit Tools Toolbar Windows Favorites Help

Enter Add Pers Change Mail Save Inquire Next Back Clear Search PrtScr Exit

PR/EMNT Name: [REDACTED] SN: 231-63-2343 HQ: Not Approved Cert: Non-Certified (v3.87)

Employee #	Name (Last, First M)	SSN	Person Id	Current Form	Document
317	[REDACTED]	[REDACTED]	813	Job G/L Dist	[REDACTED]

Job Number: 1 Employee Type: SP C O SUPERVISOR Job Status: Active

Fiscal Year: 2018

G/L Acct: 12-5-4210-111-0067-5101-0-8420-0000

CHILD NUTRITION-SUPPORT/COORDINATOR

Current Percent: 25% Budget Total: 0.00

Current Amount: 0.00 ETE: .25

FYTD Total: 2,210.28

Since this employee's GL is split between cost centers notice that the Current Percent and FTE are not 100% and 1.

After entering the GL, percent and FTE click Add/Update. If it is not 100% you will receive an error message until you have entered 100% .

QUESTIONS?

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 - ▶ pbt0611@gmail.com
- 