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payinfo

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Payroll > Maintenance > Staff Job/Pay Data > Pay Info

This tab is used to maintain a range of codes and values to identify and describe an employee's pay information. This record includes pay status, TRS information, FICA, business allowances, federal tax information, and contract totals.

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

The following fields are required:

- **Pay Campus**
- **TRS Status** code
- **Health Insurance Code**

Although all of the fields on this tab are not required, some of the fields are used for reporting to TEA, TRS, IRS, and SSA.

Complete the necessary pay information fields.

Note: If changes are made to the **W-4 Withholding Certificate**, **Tax Exempt**, or **FSP Staff Salary Data** fields in a current year pay frequency, a message is displayed prompting you to allow the same updates in the next year pay frequency, and vice versa. For example, if you made changes in pay frequency 5-Semimonthly CYR and you clicked **Yes** to allow the changes, those changes are updated in pay frequency E-Semimonthly NYR.

Field	Description
Pay Status	Click ⌄ to select the code indicating whether an employee is active or inactive for payroll calculation purposes.
Pay Campus	Click ⌄ to select the employee's pay campus. This is the campus that employs and pays the employee and distributes their paycheck if they receive a physical check. This field is required.
Pay Dept	Type the code used by the LEA to further categorize the employee.
Dock Rate	Type the standard dock rate to be used if not using the daily rate. This is the rate used when the employee has a leave transmittal that is causing a dock and the **Dock Type** is set to *A- Alternate rate* for the transmittal leave type on the Tables > Leave > Leave Rates tab.
Tax Exempt	Select if the employee's salary is exempt from taxes. If selected, the **W-4 Withholding Certificate** fields are disabled.

Field	Description
Unemployment Elig	Select if the employee is eligible for unemployment insurance. **Notes**: According to the South Texas Region of the Texas Workforce Commission, all individuals should be flagged to accumulate unemployment gross, and then submitted in the quarterly file submission. This does not mean that substitutes are eligible to file for unemployment, but that the wages earned as a substitute are figured in the calculation in the event that his status changes to that of a regular employee. According to a case precedent of the Texas Workforce Commission (TWC) Commissioners and a recent interpretation by the TWC tax department, school superintendents are now considered employees for the purpose of reporting wages to the TWC. School superintendents' wages should be reported along with all other employees when submitting quarterly wage reports.
FICA Eligibility	Click ⌄ to select the code indicating the employee's eligibility for FICA/Medicare. • *M Subject to medicare* • *N Not subject to FICA* • *Y Subject to FICA tax* Review the FICA/Medicare - Quick Reference page for additional details.
W4 Marital Status	This field was disabled as of 12/31/2019. Click ⌄ to select the code indicating the marital status of the employee. Click **Save** to save the data. If a change to the **W4 Marital Status** field is saved in the current year, you are prompted to save the change to the next year's pay information. If you make a change to next year, you are prompted to save the change to the current year's pay information. Click **Yes** to copy the record, or click **No** to continue without copying the record. **Caution**: The **W4 Marital Status** and the **Nbr of Exemptions** fields can each be saved to the next year (or current year, as applicable). If only one of these two fields has been updated, both of the fields are copied to next year (or current year). If both fields are updated, both fields are copied to next year (or current year).

Field	Description
Nbr of Exemptions	This field was disabled as of 12/31/2019. Type a two-digit number of exemptions claimed by the employee for federal income tax withholding. If 99 is entered, no tax is calculated; however, withholding gross is accumulated. Click **Save** to save the data. If a change to the **Nbr of Exemptions** field is saved in the current year, you are prompted to save the change to the next year's pay information. If you make a change to next year, you are prompted to save the change to the current year's pay information. Click **Yes** to copy the record, or click **No** to continue without copying the record. **Caution**: The **W4 Marital Status** and the **Nbr of Exemptions** fields can each be saved to the next year (or current year, as applicable). If only one of these two fields has been updated, both of the fields are copied to next year (or current year). If both fields are updated, both fields are copied to next year (or current year).
IRS Lock-In Letter	Select this field to indicate that the IRS has determined that this employee does not have sufficient withholding and has issued a Lock-in Letter to restrict changes to the employee's W-4 information. **Note**: This field is shared across all pay frequencies where the employee exists; therefore, changes to the logged-on pay frequency are effective in any other pay frequency and vice versa. If selected: • The **W-4 Withholding Certificate** and **Tax Exempt** fields on this tab are disabled preventing any changes from being made. • In EmployeePortal, on the Self-Service Profile page, the **IRS Lock-in Letter** field is displayed and set to *Y*, and the **W4 Marital Status Information** fields are disabled preventing the employee from making any changes. For more information about the IRS Lock-in Letter, visit www.irs.gov.

❏ Under **W-4 Withholding Certificate**, indicate the employee's W-4 withholding details. If **Tax Exempt** is selected, these fields are disabled.

Refer to the IRS W-4 Instructions for complete details about completing the following fields. Also, be sure to review Publication 15-T Federal Income Tax Withholding, which contains the withholding tax calculations and the FAQs on the 2020 Form W-4 page, which contains helpful information.

1:Filing Status	Click to select the employee's filing status. • *H Head of household* • *M Married filing jointly* • *S Single or Married filing separately*
2: Multi-Jobs	Select to indicate that there are multiple jobs in the household.

3: Children under 17	This field is used to determine the amount of child tax credit an employee may be able to claim for qualifying dependent children under the age of 17 when filing their tax return. The amount is calculated by multiplying the number entered in this field by the designated amount in Step 3 on the W-4 form for the applicable reporting tax year. Refer to Pub. 501, Dependents, Standard Deduction, and Filing Information for additional eligibility requirements. Type the number of children in the household under the age of 17 as of December 31.
3: Other Dependents	This field is used to determine the amount of tax credit an employee may be able to claim for other qualifying dependents when filing their tax return. The amount is calculated by multiplying the number entered in this field by the designated amount in Step 3 on the W-4 form for the applicable reporting tax year. Refer to Pub. 501, Dependents, Standard Deduction, and Filing Information for additional eligibility requirements. Type the number of other dependents in the household.
3: Other Exemptions	Type the amount of any other exemptions that may affect the employee's federal income tax withholding.
4a: Other Income	Type the amount of any other income that may affect the employee's federal income tax withholding.
4b: Other Deductions	Type the amount of any other deductions that may affect the employee's federal income tax withholding.

❏ Under **TRS**:

Status	Required TRS reporting field. Click to select the code indicating the employee's status in regard to having a TRS deposit computed. • *1 Eligible* • *2 Non-eligible* • *3 Substitute* • *4 Retirement waived* • *5 Retired* • *6 Other (non-eligible)*

IMPORTANT: In order for the retiree pension surcharge to apply to an employee, the **Status** field must be set to 4 or 5, and **Take Retiree Surcharge** on the Employment Info page must be selected. (In the next year pay frequency, **NY Take Retiree Surcharge** should be selected for the retiree pension surcharge to apply to an employee.)

Begin Date	Type the date the employee started contributing to TRS in the MM-DD-YYYY format. Be sure to log on to the TRS Reporting Entity Portal to verify the employee's information. **New Member Fee Information**: If the employee has satisfied the 90-day New Member requirement per the TRS Portal, the LEA should determine and enter a date outside of the 90-day period to prevent the new member Employer TRS Contribution from being calculated. For example, some LEAs may use the earliest date from the employee's service record.
End 90 Day Period	Type the end date of the 90-day waiting period in the MM-DD-YYYY format. This field is populated by the system if: Pay Status = 1 - Active TRS Status = 1 - Eligible Begin Date >= 09-01-2005 **Note**: The **End 90-day Period Date** no longer has to be blank in order for the **End 90 Day Period** link to function. Click **End 90 Day Period** to calculate the end date of the 90-day waiting period. If the date in this field is within the TRS Month for the processed pay dates in the Pay Dates table, the employee is not included on the Statutory Minimum Report #373 (HRS4000). If the distribution is to a federal fund, the employee is not included in the TRS 3 Report (HRS4050). However, the employee is included in the TRS 489 Report (HRS4100) and on the Payments for New Member report (HRS9865).

❑ Under **FSP Staff Salary Data**:

Health Ins Code	Click to select a code that indicates the employee's eligibility. **Note**: If the LEA participates in the TEA health insurance plan, the employee must be TRS eligible (i.e., TRS Status Code must be set to 1) and have a Deduction Code with the abbreviated code of AC. Also, the AC deduction must have a remaining payment greater than zero. If an employee and spouse are eligible for and are participating in the health insurance program and one employee is insured through the spouse's policy, only one person receives the TEA State Contributions for both in his paycheck. See Deductions, TEA Contrib Factor for guidance on how to handle this situation. Select *Y Eligible participating Health Insurance* for employees who participate in the TEA health insurance. When this field is set to Y, the employee is eligible for the TEA health insurance contribution if it is used by the LEA (see Tables > District HR Options). Select *S Eligible spouse participating* for employees that participate in the TEA health insurance, whose spouse works for the same LEA, service center, or charter school and are insured through the spouse's policy. Select *W Eligible Health Insurance* for employees who are eligible but choose not to participate in the TEA health insurance. Select *N Not eligible* for employees who are not eligible for the TEA health insurance.
FSP Staff Data Code	Click to select the employee eligibility code, or leave blank. This field is reported on the FSP Staff Salary Report and the Health Insurance Participation Report and is required. • *F - Full-Time* (e.g., classroom teacher, librarian, counselor, nurse, or other staff) • *P - Part-Time* (e.g., classroom teacher, librarian, counselor, nurse, or other staff)

❑ Under **Totals**, the following fields contain display-only data:

State Min. Salary	The minimum salary assigned to the employee is displayed as entered in the **State Min Salary** field under **State Info** on the Job Info tab.
Extra Duty	The total dollar value of all S-type extra duty assignments for the employee is displayed under **Extra Duty Pay** on the Pay Info tab.
Contract Amt	The total amount of pay due to the employee during the current contract period is displayed as entered in the **Total** field under **Contract Info** on the Job Info tab. This amount includes the total gross salary and all G-type extra duty assignments.
Contract Balance	The total amount remaining to be paid to the employee during the current contract period is displayed as entered in the **Balance** field under **Contract Info** on the Job Info tab.

Extra duty account type detail

The extra duty information is maintained on the Personnel > Tables > Salaries > Extra Duty tab.

❏ Under **Extra Duty Pay**:

❏ Click **+Add** to add a row.

Extra Duty Pay Code	Click ˅ to select the two-digit code of the additional job assignment. This information is defined in the Extra Duty table.
Type	The single character account type code (e.g., G = standard gross salary or S = supplement pay) that identifies the type of salary based on the extra duty pay code selected is displayed.
Amount	The pay amount authorized for the selected extra duty pay code is displayed.
Remain Amt	If the account type for the job code is S - Supplemental pay, the field is active and you can type an amount remaining for this job code. If the account type is G - Standard Gross pay, the field is disabled. For S account types, if the employee's primary job is being paid off, the remaining amount will be paid to the employee.
Remain Pymts	If the account type for the job code is S - Supplemental pay, the field is active, and the user can type the number of payments remaining for this job code. If the account type is G - Standard Gross pay, the field is disabled.

❏ Click **Refresh Type/Amount** to update the Amount field with the amount in the table associated with the selected extra duty pay code.

Notes:

Extra duty pay codes that are account type “S - Supplemental pay” must be manually added to the Distributions tab as “XTRA - Extra Duty” job codes. Extra duty pay codes that are account type “G - Standard Gross pay” must have the job amount manually added to the Job Info tab, **Contract Info Total** field for one of the non-XTRA jobs assigned to the employee. The distributions also need to be added or adjusted manually. Remaining balances for extra duty jobs that are account type “S - Supplemental pay” will be paid off when the primary job is in contract payoff.

Extra duty pay totals include B (Non-TRS taxable business allowances), G (Standard gross pay), S (Supplemental pay), and T (Non-TRS non-taxable business allowances) type accounts.

The bank information is maintained on the Payroll > Tables > Bank Codes > Bank Codes tab.

For security purposes, any updates saved to the employee's bank information will generate an email to the employee notifying them of the change. The email is sent to the employee's **Work** and/or **Home E-mail** address listed on the Personnel > Maintenance > Staff Demo > Demographic Information page. If both email addresses are populated, the email will be sent to both emails. If an email is not available, then the employee will not receive an email.

❏ Under **Bank Info**:

❏ Click **+Add** to add a row. Employees can designate from which accounts their net pay is to be distributed. Multiple entries can be made.

Bank	Type the bank or credit union code, or click ⋮ to select the three-digit code identifying the bank or credit union to which the employee is depositing funds. Employees can have multiple bank deposit records.
Bank Acct Nbr	Type the bank account number that corresponds to the bank to which the employee is depositing funds. The number is provided for direct deposit and can be a maximum of 17 digits.
Bank Acct Type	Click ⌄ to select the one-digit code that represents the bank account type (i.e., checking or savings).
PreNote	Select if the bank account information is to be included in a prenote EFT file used to notify banks of employees who are new to the EFT direct deposit program. After the prenote EFT file has been created, the **PreNote** field is cleared.
Bank Acct Amt	Type the allocated direct deposit amount for each designated bank account. Leave at zero for the remainder of funds to be allocated. One bank account record with a zero amount must exist to indicate where the remainder of the employee’s pay is to be deposited. If there is not sufficient pay to cover a specified amount for a bank record, then the bank record is ignored and the amount is recorded to the zero amount bank record. **Example**: The employee has two direct deposit accounts, one account has $1000 allocated to it and the other account is set to zero. If the employee is docked pay and does not receive enough pay to cover the $1000, then the full direct deposit amount is sent to the zero amount account.

❏ Click **Save**.

A message is displayed prompting you to update bank records to next year.

- Click **Yes** to copy the records to next year.
- Click **No** to continue without copying the record to next year.