



Calculating Retiree Surcharge

Table of Contents

Calculating Retiree Surcharge i

Calculating Retiree Surcharge 1

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The Run Payroll process uses the **Retiree Exception** field on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab along with the **Employment Type** and **Take Retiree Surcharge** fields on the Personnel > Maintenance > Employment Info tab to determine whether or not to calculate a retiree surcharge for an employee. This table provides information on when a surcharge should be calculated based on these factors.

Key:

| | |
|-------------------------------|--|
| Employment Type | <i>F - Half-Time or more</i> <i>M - Temporary</i> <i>P - Less than Half-Time</i> <i>S - Substitute</i> |
| Take Retiree Surcharge | Selected = (Y) Yes Not selected = (N) No |
| Retiree Exception | <i>E Surge Personnel</i> <i>B Non-Profit Tutor Substitute</i> <i>N Non-Profit Tutor Half Time or Less</i> <i>T Non-Profit Tutor Full Time</i> |

| Employment Type | Take Retiree Surcharge | Retiree Exception | Calculate Surcharge? |
|-----------------|------------------------|-------------------|----------------------|
| S | Y, N | E | No |
| H | Y, N | E | No |
| F | Y | E | No |
| F | N | E | No |
| C | Y | E | No |
| C | N | E | No |
| S | Y, N | B | No |
| H | Y | B | Yes |
| H | N | B | No |
| F | Y | B | Yes |
| F | N | B | No |
| C | Y | B | Yes |
| C | N | B | No |
| S | Y | N | Yes |
| S | N | N | No |
| H | Y | N | Yes |
| H | N | N | No |
| F | Y | N | Yes |
| F | N | N | No |
| C | Y | N | Yes |
| C | N | N | No |
| S | Y | T | Yes |
| S | N | T | No |

| Employment Type | Take Retiree Surcharge | Retiree Exception | Calculate Surcharge? |
|-----------------|------------------------|-------------------|----------------------|
| H | Y | T | Yes |
| H | N | T | No |
| F | Y | T | Yes |
| F | N | T | No |
| C | Y | T | Yes |
| C | N | T | No |