



Calculating Retiree Surcharge

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

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