Pay Info - HRS7700

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The Payroll Simulation tabs are used to create simulated payrolls for individual employees or groups of employees. This feature can show new employees what their checks will be or to show existing employees the changes to their paychecks before the changes become effective.

The Pay Info tab is used to retrieve pay information for a current employee or create pay information for a pending employee in the current year or next year payroll. The data allows you to create simulated payroll changes for proposed position changes or promotions. This data includes pay status, TRS information, accrual data, and totals for salary, contract amount, and contract balance. Before using this tab, ensure that each employee has a demographic record as created using the Demographic Information tab on the Staff Demographic page.

This tab consists of a free-form area at the top and two grids at the bottom.

Add payroll simulation pay information:

❑ Under **Parameters**, select the employee whose employment information is being changed for payroll simulation.

Field	Description
Pay Status	Select whether active, inactive, or both groups are to be included in the process.
Pay Type	Click ⌄ to select the one-digit pay type to be included in the process. The system is set to All.
Job Code	Click ⌄ to select the four-digit job code to be included in the process. The system is set to All.
Accrual Code	Click ⌄ to select the one-character accrual code to be included in the process. The system is set to All.
Pay Grade	Type the three-digit pay grade to be included in the process.
Prior Yr Emp Date	Type a date in the MMDDYYYY format for the previous school year reemployment date. The system will select all employees who were hired on or before that date. If there is no reemployment date from the previous school year, the system will use the employee's original employment date.
Primary Campus	Click ⌄ to select the three-digit primary campus to be included in the process. The system is set to All.
Pay Campus	Click ⌄ to select the three-digit pay campus to be included in the process. The system is set to All.
Contract Begin Date	Click ⌄ to select the exact contract begin date to be included in the process.
Contract End Date	Click ⌄ to select the exact contract end date to be included in the process.

Field	Description
Contract Months	Type the contract months to be included in the process.
Payoff Date	Click ⋮ to select the payoff date to be included in the process.
Payroll Freq	Click ⌄ to select the one-digit payroll frequency to be included in the process. The system is set to the current logged-on payroll frequency. A specific payroll frequency must be selected; otherwise, no data displays.
Salary Concept	Click ⌄ to select the salary concept to be used in the process. The system is set to All. However, when calculating salaries, a specific salary concept must be selected (e.g., A - Use annual salary table, D - Use hourly/daily rate table, or M - Use mid-point table). If All is selected, the system will not perform salary calculations.
Extract ID	Click ⌄ to select a three-character, locally assigned code (e.g., En1 = English 1, AL2 = Algebra 2, HI4 = History 4) for grouping employees. The code is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function.
Employee Nbr	If you want to update data for only one employee, type the employee number, if known. If the employee number is not known or multiple employees are needed, click ⋮ to select employees.

Notes:

- If more than one employee is selected, the system only populates the Addendum tab with all selected employees. The other Payroll Simulation tabs are not populated.
- Once an employee is selected, the same employee's information is presented on all tabs of the Payroll Simulation utility.
- A specific payroll frequency must be selected before clicking **Execute**; otherwise, no data displays. The user can select either the current year or next year frequencies. All other parameters are optional.

☐ Click **Execute** to retrieve the selected employee.

Pay Status	Click ⌄ to select the code indicating whether an employee is active or inactive for the purposes of payroll calculation.
Pay Campus	Click ⌄ to select the code of the campus at which the employee is employed.
Pay Dept	Type the code used by the district to further categorize the employee.
Dock Rate	Type the standard dock rate to be used if not using absence rate or daily rate.
Tax Exempt	Select if the employee's salary is exempt from taxes.
Unemployment Elig	Select if the employee is eligible for unemployment insurance.
FICA Eligibility	Click ⌄ to select the code indicating the employee's eligibility for FICA/Medicare.
W4 Marital Status	Click ⌄ to select the code indicating the marital status of the employee.
Nbr of Exemptions	Type a two-digit number of exemptions claimed by the employee for federal income tax withholding.
Wholly Sep Amt	Type the total annual salary that is not subject to Above State Base. The field is used in computing the monthly amounts not subject to above state base salary calculations (TRS 373).

There are different types of business allowance payments such as travel and uniform allowance that are paid during regular payroll processing. Some of these are taxable and subject to withholding. Others are nontaxable and not subject to withholding. Business allowances are not subject to TRS deductions.

Under **Business Allowance**:

❏ Under **Tax**, if the business allowance paid to the employee is subject to tax withholding deductions:

Amount	Type the business allowance amount paid on each payroll run in addition to the standard gross.
Remain Pymts	Type the two-digit number of payments due to the employee during the school fiscal year. The field decreases by one each time a payroll is processed.

❏ Under **Non Tax**, if the business allowance paid to the employee is not subject to tax withholding deductions:

Amount	Type the business allowance amount paid on each payroll run in addition to the standard gross.
Remain Pymts	Type the two-digit number of payments due to the employee during the school fiscal year. The field decreases by one each time a payroll is processed.

❏ Under **TRS**:

Status	Click ⌄ to select the code indicating the employee's status in regard to having a TRS deposit computed.
Begin Date	Type the date the employee started contributing to TRS in the MMDDYYYY format.
End 90 Day Period	Type the end date of the 90-day waiting period in the MMDDYYYY format. This field is populated by the system if: Begin Date = blank when the employee is first retrieved Pay Status = 1 - Active TRS Status = 1 - Eligible Begin Date >= 09-01-2005

❏ Under **FSP Staff Salary Data**:

Health Ins Code	Click ⌄ to select a code that indicates the employee's eligibility. **Note**: If the district 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. Set this field to Y (eligible and participating) for employees that 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 district (see Tables > District HR Options). Set this field to S (eligible spouse participating) for employees that participate in the TEA health insurance, whose spouse works for the same school district, service center, or charter school and are insured through the spouse's policy. Set this field to W (eligible and waiving) for employees who are eligible but choose not to participate in the TEA health insurance. Set this field to 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.

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

State Min. Salary	Displays the minimum salary assigned to the employee.
Extra Duty	Displays the total dollar value of all extra-duty assignments for the employee.
Contract Amt	Displays the total amount of payment due to the employee during the current contract period.
Contract Balance	Displays the total amount remaining to be paid to the employee during the current contract period.

In the extra duty pay section:

❑ Click **+Add** to add a row.

Extra Duty Pay Code	Click ⌄ to select the two-digit code of this additional job assignment. This information is defined in the Extra Duty table.
Type	The single character account type code (e.g., G = Standard gross pay or S = Supplemental pay) that identifies the type of salary based on the extra duty pay code selected is displayed.
Amount	The system displays the pay amount authorized for the extra duty pay code selected.
Remain Amt	If the account type for the job code is "S - Supplemental pay," then the field is active, and the user can type an amount remaining for this job code. If the account type is "G - Standard gross pay," then the field is protected and cannot be changed.
Remain Pymts	If the account type for the job code is "S - Supplemental pay," then 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," then the field is protected and cannot be changed.

> **Note**: 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.

In the bank section:

❏ 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 a one-digit code indicating the type of bank account (i.e., checking or savings).
PreNote	Select if this bank account information is to be included in a Pre-Note EFT file used to notify banks of employees who are new to the EFT direct deposit program. After the Pre-Note EFT file has been created, the PreNote field is cleared.
Bank Acct Amt	Type the amount allocated for direct deposit in each designated bank account. Leave at zero for the remainder of the 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.

Other functions and features:

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.
Refresh Type/Amount	Click to update the type and amount fields in the extra duty pay code grid if any information is changed or if a new row is added.