



# **ASCENDER - Position Management: Perform Retro Pay Process**



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# ASCENDER - PMIS: Retro Pay

The purpose of this document is to guide you through the Position Management Retro Pay Process. The following steps should be performed **after** the 11-month and/or 12-month employees have been rolled to the current year payroll and PMIS.

This process calculates the difference between the current salary reflected in Payroll and the new salary reflected in NY PMIS, and then pays the employee the difference via extra duty pay.

This checklist assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).



Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

## Before You Begin

Review the TRS Rules for Retro Pay.

- Reference Item **16. Retroactive Pay Increases Excluded by the Plan's Terms** under **Compensation Not Eligible for TRS** on the TRS Creditable Compensation page at [https://www.trs.texas.gov/Pages/re\\_creditable\\_compensation.aspx](https://www.trs.texas.gov/Pages/re_creditable_compensation.aspx).

## Retro Pay Process

1. [Create a simulation](#).

### Create a simulation

[Position Management](#) > [Utilities](#) > [Salary Simulation](#) > [Simulation Options](#)

Create a salary simulation for the group of employees who are owed retro pay that includes a raise.

The screenshot displays the 'Salary Simulation' utility interface. At the top, there is a 'Save' button and a 'Year: N' field. Below this, the 'Simulation Name' is '12MO RE' and the 'Simulation Description' is '12 MONTH RETRO PAY'. A navigation bar contains tabs for 'SIMULATION OPTIONS', 'FIRST PAY DATE CODES', 'FUND/FISCAL YEAR EXCLUSIONS', 'LOCAL ANNUAL', 'HOURLY/DAILY', 'EXTRA DUTY', 'MIDPOINT', 'DEDUCTIONS', and 'UPDATE SALARY TABLE'. Under 'SIMULATION OPTIONS', there are buttons for 'Retrieve', 'Add Simulation', 'Execute', and 'Delete'. A note states: 'If updating tables, please create export for Budget Tables prior to using this utility.' Below the buttons, the simulation name and description are repeated, along with a 'User ID' field. The main content area is divided into two sections: 'Calculation Options' and 'Update Options'. 'Calculation Options' includes fields for 'Include Proposed Positions' (No), 'Include Vacant Supplement Positions' (Yes), 'Increment Pay Steps' (Yes), 'Maximum Annual Pay Step' (0), 'Maximum Hourly/Daily Pay Step' (0), 'Increment State Steps' (Yes), 'Include TRS On-Behalf Calculations' (No), 'Expenditure Account for TRS On-Behalf Calculations' (XXX-XX-6144.XX-XXX-XXXXXX), 'For Midpoint Salaries - Basis of Salary Change' (T - Use Simulation Mid Inc/Dec Amt), 'For Midpoint Salaries - Increase Pay Rate to Minimum' (No), and 'Include TEA Health Insurance' (No). 'Update Options' includes 'Update for Active Positions Only' (B - Move Actual Amount to Budget Amount), 'Update Forecast' (Yes), 'Update Budget' (R - Replace the amounts in Budget), 'Update Budget Amount' (R - Recommended Amount), and 'Round Budget Amount to nearest dollar' (Yes).

- Under **Update Options**, in the **Update Forecast** field, select Yes.
- Click **Execute** to begin the simulation process.
- Under **Calculation Reports**:
  - Select the report(s) from the list. Click **Select All** or **Unselect All** to select all of the reports or unselect all reports.
  - Click **Generate Reports**. The reports are displayed in the order selected.
- Click **Process** to save the data to budget and/or PMIS records based on the **Update Options** selected. And, then process the simulation. The simulation updates the forecast and clears the **Accept Changes** checkbox.



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