



**step11b**



# Table of Contents



## Human Resources > Utilities > Mass Update

Use the Mass Update utility to update employee data in preparation for the new school year. This utility allows you to quickly and easily mass change data resulting in minimal manual changes to individual employee records with less possibility manual entry errors.

**Important:** To avoid entering data in an incorrect pay frequency, be mindful of the payroll frequency to which you are logged on as you may be changing back and forth between the current year and next year pay frequencies for several months.

### ☐ [Human Resources > Utilities > Mass Update > Deductions](#)

This utility is used to update deductions for a number of employees at a single time. Deduction data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Deductions tab allows users to add, change, and delete deduction codes as well as alter the number of remaining payments and the existing dollar amounts associated with the deductions. Mass deduction updates are very useful at the beginning of the year when many employees are being added to insurance programs. Once deductions are added using this tab, they are reflected in the individual deduction records.

- Under **Parameters**, select the employees whose deduction data is to be changed.  
**TIP:** Prior to processing a mass update, capture a screenshot of the used parameters for future reference.
- Under **Method**, select the type of deduction change to be implemented.

Click **Execute**. A preview report is displayed. [Review the report](#).

Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page.

If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.

### ☐ [Human Resources > Utilities > Mass Update > Leave](#)

This tab is disabled as leave is only updated in the current year.

### ☐ [Human Resources > Utilities > Mass Update > Employee](#)

This utility is used to update employee data for a number of employees at a single time. Employee data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Employee tab allows users to reset, increment, or modify employee data. The data that may be altered includes the number of annual payments, number of days employed, contract begin date, and number of years of local experience. Once employee data is altered using this page, changes are reflected in the individual employee records.

Utilities > Mass Update SessionTimer: 26 min and 12 sec

**Parameters**

Pay Status: ☒ Active ☐ Inactive ☐ Both

Primary Campus: All Payoff Date:

Pay Type: 1 Contracted employee Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date:  Salary Concept: All

Accrual Code: All Contract End Date:  Extract ID: 187 187 day teachers

Pay Grade:  Contract Months:  Employee Nbr:

Prior Yr Emp Date: 00-00-0000

**Buttons:** Reset

**Tabs:** Deductions Leave Employee Extra Duty Job Code Salary Calculation

**Reset**

☐ Pay Status Active ☐ Incr Pay Step Yes

☒ Fiscal Year 1 ☐ Calendar

☐ Extract ID ☒ Contract Begin Date 08-10-2020

☐ Unemployment Eligibility (ICESA Report) Yes ☒ Contract End Date 06-04-2021

☐ Take Retiree Surcharge Yes ☒ Nbr Days Empld 187

☐ NY Take Ret Surchg Yes ☒ # of Months in Contract 10

☐ Dock Rate Daily Rate ☒ Contract Days 187 Valid t

☒ Unemployment Elig Yes ☒ Local Contract Days 187

☐ EIC Code 1 Not elig ☒ Payoff Date 08-10-2021

☐ Pre-Note (FSP Staff Salary Data) Yes ☐ Pay Grade

☐ Health Ins Code ☐ Local Schedule

☐ FSP Staff Data Code ☐ Max Days

☒ Employment Type F Half-Tim ☒ Hrs/Day 8.000

☐ Retiree Employment Type ☒ Wkly Hrs Sched 40

☒ TRS Member Pos 02 Teache (Number of)

☐ Annual Payments 12

☐ Remaining Payments 12

☐ WC Annual Payments 12

☐ WC Remaining Payments 12

**Increment**

☐ Pay Step Limit:

☐ State Step Limit 20

☐ Total (Prof) Experience If Employment Date < --

☐ District (Prof) Experience If Employment Date < --

☐ District (Non-Prof) Experience If Employment Date < --

☐ Total (Non-Prof) Experience If Employment Date < --

☐ Total Job Experience If Employment Date < --

**Modify**

Contract Begin Date: -- --

Contract End Date: -- --

Nbr Days Empld: 0 0

# of Months in Contract: -- --

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date: -- --

Area Code: -- --

Zip Code: -- --

**Execute**

**Note:** Never use the **Reset**, **Increment**, and **Modify** options at the same time.

Example of **Reset**:

Utilities > Mass Update SessionTimer: 21 min and 51 sec

**Parameters**

Pay Status: ☒ Active ☐ Inactive ☐ Both

Primary Campus: All Payoff Date:

Pay Type: All Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date: 08-12-2019

Accrual Code: All Contract End Date:  Salary Concept: All

Pay Grade:  Contract Months:  Extract ID:

Prior Yr Emp Date: 00-00-0000 Employee Nbr:

**Buttons:** Reset

**Tabs:** Deductions Leave Employee Extra Duty Job Code Salary Calculation

**Reset**

☐ Pay Status Active ☐ Incr Pay Step Yes

☒ Fiscal Year 1 ☐ Calendar

☐ Extract ID ☒ Contract Begin Date 08-10-2020

☐ Unemployment Eligibility (ICESA Report) Yes ☒ Contract End Date 06-04-2021

☐ Take Retiree Surcharge Yes ☐ Nbr Days Empld

☐ NY Take Ret Surchg Yes ☐ # of Months in Contract

☐ Dock Rate Daily Rate ☐ Contract Days 000 TRS - 1

☒ Unemployment Elig Yes ☐ Local Contract Days 0

☐ EIC Code 1 Not elig ☒ Payoff Date 08-10-2021

☐ Pre-Note (FSP Staff Salary Data) Yes ☐ Pay Grade

☐ Health Ins Code ☐ Local Schedule

☐ FSP Staff Data Code ☐ Max Days

☐ Employment Type ☐ Hrs/Day 0.000

☐ Retiree Employment Type ☐ Wkly Hrs Sched 0

☐ TRS Member Pos (Number of)

☐ Annual Payments 0

☐ Remaining Payments 0

☐ WC Annual Payments 0

☐ WC Remaining Payments 0

**Increment**

☐ Pay Step Limit:

☐ State Step Limit 20

☐ Total (Prof) Experience If Employment Date < --

☐ District (Prof) Experience If Employment Date < --

☐ District (Non-Prof) Experience If Employment Date < --

☐ Total (Non-Prof) Experience If Employment Date < --

☐ Total Job Experience If Employment Date < --

**Modify**

Contract Begin Date: -- --

Contract End Date: -- --

Nbr Days Empld: 0 0

# of Months in Contract: -- --

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date: -- --

Area Code: -- --

Zip Code: -- --

**Execute**

Utilities > Mass Update SessionTimer: 20 min and 45 sec

**Parameters**

Pay Status: ☒ Active ☐ Inactive ☐ Both

Primary Campus: All Payoff Date:

Pay Type: All Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date:  Salary Concept: All

Accrual Code: All Contract End Date:  Extract ID:

Pay Grade:  Contract Months:  Employee Nbr:

Prior Yr Emp Date: 00-00-0000

**Reset**

Pay Status: Active Incr Pay Step: Yes

Fiscal Year: 1 Calendar:

Extract ID:  Contract Begin Date:

Unemployment Eligibility (ICESA Report):  Contract End Date:

Take Retiree Surcharge:  Nbr Days Empld:

NY Take Ret Surchg:  # of Months in Contract:

Dock Rate:  Contract Days: 000 TRS - 1

Unemployment Elig:  Local Contract Days: 0

EIC Code: 1 Not elig:  Payoff Date:

Pre-Note (FSP Staff Salary Data): Yes Pay Grade:

Health Ins Code:  Local Schedule:

FSP Staff Data Code:  Max Days:

Employment Type:  Hrs/Day: 0.000

Retiree Employment Type:  Wkly Hrs Sched: 0

TRS Member Pos:  (Number of)

☒ Annual Payments: 12

☒ Remaining Payments: 12

☒ WC Annual Payments: 12

☒ WC Remaining Payments: 12

**Increment**

Pay Step:  Limit:

State Step:  Limit 20

Total (Prof) Experience:

If Employment Date <

District (Prof) Experience:

If Employment Date <

District (Non-Prof) Experience:

If Employment Date <

Total (Non-Prof) Experience:

If Employment Date <

Total Job Experience:

If Employment Date <

**Modify**

Contract Begin Date: From To

Contract End Date: From To

Nbr Days Empld: 0 0

# of Months in Contract:

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date:

Area Code:

Zip Code:

**Execute**

Example of **Increment**:

Utilities > Mass Update SessionTimer: 18 min and 58 sec

**Parameters**

Pay Status: ☒ Active ☐ Inactive ☐ Both

Primary Campus: All Payoff Date:

Pay Type: 1 Contracted employee Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date:  Salary Concept: All

Accrual Code: All Contract End Date:  Extract ID:

Pay Grade:  Contract Months:  Employee Nbr:

Prior Yr Emp Date: 01-06-2020

**Reset**

Pay Status: Active Incr Pay Step: Yes

Fiscal Year: 1 Calendar:

Extract ID:  Contract Begin Date:

Unemployment Eligibility (ICESA Report):  Contract End Date:

Nbr Days Empld:

**Increment**

Pay Step:  Limit:

☒ State Step

☒ Limit 20

Total (Prof) Experience:

**Modify**

Contract Begin Date: From To

Contract End Date: From To

Nbr Days Empld: 0 0

# of Months in Contract:

Contract Days:

Payoff Date:

**Execute**

Example of **Modify**:

Utilities > Mass Update SessionTimer: 13 min and 42 sec

**Parameters**

Pay Status: ☒ Active ☐ Inactive ☐ Both

Primary Campus: All Payoff Date:

Pay Type: All Pay Campus: All Frequency: F Monthly NYR

Job Code: All Contract Begin Date:  Salary Concept: All

Accrual Code: All Contract End Date:  Extract ID:

Pay Grade:  Contract Months:  Employee Nbr:

Prior Yr Emp Date:

**Reset**

Pay Status: Active Incr Pay Step: Yes

Fiscal Year: 1 Calendar:

Extract ID:  Contract Begin Date:

Unemployment Eligibility (ICESA Report):  Contract End Date:

Nbr Days Empld:

**Increment**

Pay Step:  Limit:

State Step:  Limit 20

Total (Prof) Experience:

If Employment Date <

District (Prof) Experience:

If Employment Date <

**Modify**

Contract Begin Date: 08-12-2019 08-10-2020

Contract End Date: 06-02-2020 06-04-2021

Nbr Days Empld: 0 0

# of Months in Contract:

Contract Days: 000 TRS - 1 000 TRS - 1

Payoff Date: 08-10-2020 08-10-2021

**Execute**

- The first run is to update the contract dates, but not increment any pay steps. Complete only the fields under **Modify**.
  - Under **Modify**, complete the applicable fields.
  - The **Area Code** and **Zip Code** is updated in both the current year and next year.
  - In the **Prior Year Employment Date** field, type today's date in the MMDDYYYY format and select the pay frequency. This changes the contract dates for all employees, regardless of the date they came to work for the LEA.

**Note:** The **Prior Year Employment Date** field uses the date in the **Latest Re-Employ Date** field on the [Human Resources > Maintenance > Staff Job/Pay Data > Employment Info](#). If this date is blank or contains zeros, it uses the date in the **Original Emp. Date** field. If no date exists in either field, the employee is not updated.

- The second run is for pay purposes to update all employees with one year of earned experience.
  - In the **Prior Year Employment Date** field, enter a date in January (i.e., 01-XX-XXXX) that represents the maximum number of days required for the employee to have earned a pay step advance (e.g., 90 days).
  - This run does not include any employees hired after that date because they should not receive a step advance for pay purposes but consult your LEA's policy.
  - Under **Increment**, complete only the **Pay Step** and **State Step** fields.

The screenshot displays the 'Utilities > Mass Update' application window. At the top, it shows 'SessionTimer: 12 min and 44 sec'. The 'Parameters' section includes fields for 'Pay Status' (Active, Inactive, Both), 'Primary Campus' (All), 'Payoff Date' (F Monthly NYR), 'Pay Type' (All), 'Job Code' (All), 'Accrual Code' (All), 'Pay Grade' (empty), and 'Prior Yr Emp Date' (01-06-2020, highlighted with a red arrow). Below this are tabs for 'Deductions', 'Leave', 'Employee', 'Extra Duty', 'Job Code', and 'Salary Calculation'. The 'Employee' tab is active. The 'Increment' section is circled in red, showing 'Pay Step' and 'State Step' checked with a 'Limit' of 20. The 'Modify' section is also visible on the right, showing fields for 'Contract Begin Date', 'Contract End Date', 'Nbr Days Empld', '# of Months in Contract', 'Contract Days', 'Payoff Date', 'Area Code', and 'Zip Code'.

**Caution:** Do not update any experience fields at this time. Experience should not be updated until after the service records have been extracted and saved. Once the service records are complete, you can update records in either the current year or the next year. It is important not to forget this step as it must be completed prior to PEIMS reporting in October.

Use the Extra Duty tab to change employee extra duty assignments that display on the Pay Info tab.

Run the [Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6550 - Employee Extra Duty Report](#) by code before performing the extra duty mass updates. Once you update your changes, run the HRS6550 report in the NYR frequency to verify that the changes are correct.

❑ [Human Resources > Utilities > Mass Update > Extra Duty](#)

This utility is used to update extra duty assignments for a number of employees at a single time. Extra duty data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Extra Duty tab allows users to add, change, and delete extra duty codes as well as alter the existing dollar amounts associated with the extra duty assignments. Once extra duty assignments are changed or deleted using this page, modifications are reflected in the individual extra duty records.

- Under **Parameters**, select the employees and records to be copied to the current year.  
**TIP:** Prior to processing a mass update, capture a screenshot of the used parameters for future reference.
- Under **Method**, select the extra duty changes to be implemented.

Click **Populate Extra Duty Code Description** to update the **Amount** field when a different extra duty code is selected.

Click **Execute**. A preview report is displayed. [Review the report](#).

Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page. If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.

❑ [Human Resources > Utilities > Mass Update > Job Code](#)

This utility is used to update job code data for a number of employees at a single time. Job code data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Job Code tab allows users to modify job code data. Once job code data is altered using this page, changes are reflected in the individual records

Use the Job Code tab to change employee job assignments that display on the Job Info tab. This change modifies the Job Info and Distribution tabs.

**Note:** If accruals are associated with job codes, make changes with caution and verify.

- Under **Parameters**, select the employees whose job code data is to be changed.  
**TIP:** Prior to processing a mass update, capture a screenshot of the used parameters for future reference.
- Under **Change Job Code to Another Code:**

|                    |                                               |
|--------------------|-----------------------------------------------|
| <b>If Job Code</b> | Click ▼ to select the job code to be changed. |
| <b>Change To</b>   | Click ▼ to select the new job code.           |

Click **Execute**. A preview report is displayed. [Review the report](#).

Click **Process** to accept the changes and continue. Or, click **Cancel** to return to the Mass Update page. If you click **Process**, a message is displayed prompting you to create a [backup](#). A backup is highly recommended.



## Back Cover