



## step11b



## Table of Contents



## Payroll or Personnel > 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 of manual entry errors.

**Important:** To avoid entering data in an incorrect pay frequency, be mindful of the pay 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.

### Payroll > 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.

## Payroll > Utilities > Mass Update > Leave

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

## Payroll > 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.

**Parameters**

Pay Status:  Active  Inactive  Both

Pay Type: 1 Contracted employee

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date: 00-00-0000

Primary Campus: All

Pay Campus: All

Contract Begin Date: 08-14-2024

Contract End Date: 05-30-2025

Contract Months: 187

Payoff Date:

Frequency: F MONTHLY NYR

Salary Concept: All

Extract ID: 187 187 day teachers

Employee Nbr:

**DEDUCTIONS** **LEAVE** **EMPLOYEE** **EXTRA DUTY** **JOB CODE**  **SALARY CALCULATION**

**Reset**

Pay Status  Incr Pay Step  
 Fiscal Year  Calendar  
 Dock Rate  Contract Begin Date Yes  
 Unemployment Elig  Contract End Date 08-14-2024  
 Pre-Note  Nbr Days Empid 187  
 (FSP Staff Salary Data)  # of Months in Contract 10  
 Health Ins Code  Contract Days 187 Valid!  
 FSP Staff Data Code  Local Contract Days 187  
 TRS Member Pos  Payoff Date 08-09-2025  
  
 (Number of)  
 Annual Payments 12  
 Remaining Payments 12  
 WC Annual Payments 12  
 WC Remaining Payments 12  
  
 Pay Grade  Local Schedule  
 Max Days  Hrs/Day 0.000  
 Wkly Hrs Sched

**Increment**

Pay Step  Limit:   
 Calendar  Limit 20  
 Contract Begin Date  Total Job Experience  
 Contract End Date  If Employment Date <

**Modify**

From To  
Contract Begin Date:    
Contract End Date:    
Nbr Days Empid: 0 0  
# of Months in Contract:    
Contract Days: 000 TRS -  000 TRS -   
Payoff Date:

**Execute**

□ Under **Parameters**, select the employees whose employee data is to be changed.

**TIP:** Prior to processing a mass update, capture a screenshot of the used parameters for future reference.

**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:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both
Pay Type:	All
Job Code:	All
Accrual Code:	All
Pay Grade:	
Prior Yr Emp Date:	00-00-0000

Primary Campus: All Payoff Date:

Pay Campus: All Frequency: F Monthly N/YR

Contract Begin Date: 08-12-2019 Contract End Date:

Contract Months:

Salary Concept: All Extract ID:

Employee Nbr:

**Reset**

Pay Status	Active	Incr Pay Step	Yes
Fiscal Year	1	Calendar	
Extract ID		Contract Begin Date	08-10-2020
Unemployment Eligibility (ICESA Report)		Contract End Date	06-04-2021
Take Retiree Surcharge		Nbr Days Empld	
NY Take Ret Surchg		# of Months in Contract	
Dock Rate		Contract Days	000 TRS - 1
Unemployment Elig		Daily Rate	
EIC Code		Local Contract Days	0
Pre-Note (FSP Staff Salary Data)		Payoff Date	08-10-2021
Health Ins Code		1 Not eligl	
FSP Staff Data Code		Pay Grade	
Employment Type		Local Schedule	
Retiree Employment Type		Max Days	
TRS Member Pos		Hrs/Day	
		Wkly Hrs Sched	
		(Number of)	
		Annual Payments	0
		Remaining Payments	0
		WC Annual Payments	0
		WC Remaining Payments	0

**Increment**

Pay Step	Limit: <input type="text"/>
State Step	Limit 20
Total (Prof) Experience	If Employment Date < <input type="text"/>
District (Prof) Experience	If Employment Date < <input type="text"/>
District (Non-Prof) Experience	If Employment Date < <input type="text"/>
Total (Non-Prof) Experience	If Employment Date < <input type="text"/>
Total Job Experience	If Employment Date < <input type="text"/>

**Modify**

Contract Begin Date:	From: <input type="text"/>	To: <input type="text"/>
Contract End Date:	From: <input type="text"/>	To: <input type="text"/>
Nbr Days Empld:	From: 0	To: 0
# of Months in Contract:	From: <input type="text"/>	To: <input type="text"/>
Contract Days:	From: 000 TRS - 1	To: 000 TRS - 1
Payoff Date:	From: <input type="text"/>	To: <input type="text"/>
Area Code:	From: <input type="text"/>	To: <input type="text"/>
Zip Code:	From: <input type="text"/>	To: <input type="text"/>

**Execute**

Utilities > Mass Update SessionTimer: 20 min and 45 sec

**Parameters**

Pay Status:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both
Pay Type:	All
Job Code:	All
Accrual Code:	All
Pay Grade:	
Prior Yr Emp Date:	00-00-0000

Primary Campus: All Payoff Date:

Pay Campus: All Frequency: F Monthly N/YR

Contract Begin Date:  Contract End Date:

Contract Months:

Salary Concept: All Extract ID:

Employee Nbr:

**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		Daily Rate	
EIC Code		Local Contract Days	0
Pre-Note (FSP Staff Salary Data)		Payoff Date	
Health Ins Code		1 Not eligl	
FSP Staff Data Code		Pay Grade	
Employment Type		Local Schedule	
Retiree Employment Type		Max Days	
TRS Member Pos		Hrs/Day	
		Wkly Hrs Sched	
		(Number of)	
		Annual Payments	12
		Remaining Payments	12
		WC Annual Payments	12
		WC Remaining Payments	12

**Increment**

Pay Step	Limit: <input type="text"/>
State Step	Limit 20
Total (Prof) Experience	If Employment Date < <input type="text"/>
District (Prof) Experience	If Employment Date < <input type="text"/>
District (Non-Prof) Experience	If Employment Date < <input type="text"/>
Total (Non-Prof) Experience	If Employment Date < <input type="text"/>
Total Job Experience	If Employment Date < <input type="text"/>

**Modify**

Contract Begin Date:	From: <input type="text"/>	To: <input type="text"/>
Contract End Date:	From: <input type="text"/>	To: <input type="text"/>
Nbr Days Empld:	From: 0	To: 0
# of Months in Contract:	From: <input type="text"/>	To: <input type="text"/>
Contract Days:	From: 000 TRS - 1	To: 000 TRS - 1
Payoff Date:	From: <input type="text"/>	To: <input type="text"/>
Area Code:	From: <input type="text"/>	To: <input type="text"/>
Zip Code:	From: <input type="text"/>	To: <input type="text"/>

**Execute**

Example of **Increment**:

Utilities > Mass Update SessionTimer: 18 min and 58 sec

**Parameters**

<b>Pay Status:</b>	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both	<b>Primary Campus:</b> All	<b>Payoff Date:</b> <input type="text"/>	<b>Reset</b>
<b>Pay Type:</b>	1 Contracted employee	<b>Pay Campus:</b> All	<b>Frequency:</b> F Monthly NYR	
<b>Job Code:</b>	All	<b>Contract Begin Date:</b> <input type="text"/>	<b>Salary Concept:</b> All	
<b>Accrual Code:</b>	All	<b>Contract End Date:</b> <input type="text"/>	<b>Extract ID:</b> <input type="text"/>	
<b>Pay Grade:</b>	<input type="text"/>	<b>Contract Months:</b> <input type="text"/>	<b>Employee Nbr:</b> <input type="text"/>	
<b>Prior Yr Emp Date:</b> 01-06-2020				

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

**Reset** **Increment** **Modify** **Execute**

<input type="checkbox"/> Pay Status	Active	<input type="checkbox"/> Incr Pay Step	Yes	<input type="checkbox"/> Pay Step	Contract Begin Date:	From	To
<input type="checkbox"/> Fiscal Year	1	<input type="checkbox"/> Calendar	<input type="checkbox"/> Limit:	<input type="checkbox"/> State Step	Contract End Date:	<input type="checkbox"/> Contract End Date:	<input type="checkbox"/> Contract End Date:
<input type="checkbox"/> Extract ID	<input type="checkbox"/> Contract Begin Date	<input type="checkbox"/> Contract End Date	<input type="checkbox"/> Limit 20	<input type="checkbox"/> Total (Prof) Experience	Nbr Days Empid:	0	0
<input type="checkbox"/> Unemployment Eligibility (ICESA Report)	<input type="checkbox"/> Nbr Days Empid	<input type="checkbox"/> # of Months in Contract	<input type="checkbox"/> # of Months in Contract	<input type="checkbox"/> If Employment Date < ..	# of Months in Contract:	<input type="checkbox"/> District (Prof) Experience	<input type="checkbox"/> District (Prof) Experience
<input type="checkbox"/> Take Retiree Surcharge	<input type="checkbox"/> Contract Days	<input type="checkbox"/> Payoff Date:	<input type="checkbox"/> If Employment Date < ..	<input type="checkbox"/> Contract Days:	000 TRS - 1	000 TRS - 1	000 TRS - 1
<input type="checkbox"/> NY Take Ret Surchg	<input type="checkbox"/> Daily Rate	<input type="checkbox"/> Local Contract Days	<input type="checkbox"/> Payoff Date:	<input type="checkbox"/> Payoff Date:	08-10-2020	08-10-2021	08-10-2021
<input type="checkbox"/> Dock Rate							

### Example of **Modify**:

Utilities > Mass Update SessionTimer: 13 min and 42 sec

**Parameters**

<b>Pay Status:</b>	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Both	<b>Primary Campus:</b> All	<b>Payoff Date:</b> <input type="text"/>	<b>Reset</b>
<b>Pay Type:</b>	All	<b>Pay Campus:</b> All	<b>Frequency:</b> F Monthly NYR	
<b>Job Code:</b>	All	<b>Contract Begin Date:</b> <input type="text"/>	<b>Salary Concept:</b> All	
<b>Accrual Code:</b>	All	<b>Contract End Date:</b> <input type="text"/>	<b>Extract ID:</b> <input type="text"/>	
<b>Pay Grade:</b>	<input type="text"/>	<b>Contract Months:</b> <input type="text"/>	<b>Employee Nbr:</b> <input type="text"/>	
<b>Prior Yr Emp Date:</b> <input type="text"/>				

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

**Reset** **Increment** **Modify** **Execute**

<input type="checkbox"/> Pay Status	Active	<input type="checkbox"/> Incr Pay Step	Yes	<input type="checkbox"/> Pay Step	Contract Begin Date:	From	To
<input type="checkbox"/> Fiscal Year	1	<input type="checkbox"/> Calendar	<input type="checkbox"/> Limit:	<input type="checkbox"/> State Step	Contract End Date:	<input type="checkbox"/> Contract End Date:	<input type="checkbox"/> Contract End Date:
<input type="checkbox"/> Extract ID	<input type="checkbox"/> Contract Begin Date	<input type="checkbox"/> Contract End Date	<input type="checkbox"/> Limit 20	<input type="checkbox"/> Total (Prof) Experience	Nbr Days Empid:	0	0
<input type="checkbox"/> Unemployment Eligibility (ICESA Report)	<input type="checkbox"/> Nbr Days Empid	<input type="checkbox"/> # of Months in Contract	<input type="checkbox"/> # of Months in Contract	<input type="checkbox"/> If Employment Date < ..	# of Months in Contract:	<input type="checkbox"/> District (Prof) Experience	<input type="checkbox"/> District (Prof) Experience
<input type="checkbox"/> Take Retiree Surcharge	<input type="checkbox"/> Contract Days	<input type="checkbox"/> Payoff Date:	<input type="checkbox"/> If Employment Date < ..	<input type="checkbox"/> Payoff Date:	000 TRS - 1	000 TRS - 1	000 TRS - 1
<input type="checkbox"/> NY Take Ret Surchg	<input type="checkbox"/> Daily Rate	<input type="checkbox"/> Local Contract Days	<input type="checkbox"/> Payoff Date:	<input type="checkbox"/> Payoff Date:	08-12-2019	08-10-2020	06-04-2021
<input type="checkbox"/> Dock Rate							

□ 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 [Personnel > Maintenance > 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.

Utilities > Mass Update

Session Timer: 12 min and 44 sec

**Parameters**

Pay Status:  Active  Inactive  Both

Primary Campus: All

Payoff Date: ...

Frequency: F Monthly NYR

Pay Type: All

Pay Campus: All

Contract Begin Date:

Salary Concept: All

Job Code: All

Contract End Date:

Extract ID:

Accrual Code: All

Contract Months:

Employee Nbr:

Pay Grade:

Prior Yr Emp Date: 01-06-2020

**Increment**

Pay Step  Limit:

State Step  Limit 20

**Modify**

Contract Begin Date:  0

Contract End Date:  0

Nbr Days Empd:

# of Months in Contract:

Local Contract Days:

Payoff Date:

Pay Grade:

Local Schedule:

Max Days:

Hrs/Day:

Wkly Hrs Sched:

(Number of):

Annual Payments:

Remaining Payments:

WC Annual Payments:

WC Remaining Payments:

From:

To:

Execute

**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.

- Click **Execute**. A preview report is displayed. [Review the report](#).
- Click **Process**. You are prompted to create a [backup](#). A message is displayed indicating that the process was successfully completed. Or, click **Cancel** to return to the Mass Update page.
- Use the Extra Duty tab to change employee extra duty assignments that display on the Pay Info tab.
- Run the [Personnel > 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.

## Payroll > 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.

#### [Payroll > 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