



**step11b**



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## 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.

The screenshot displays the 'Utilities > Mass Update' interface with the 'Employee' tab selected. The interface is divided into several sections:

- Parameters:** Includes fields for Pay Status (Active, Inactive, Both), Primary Campus, Pay Campus, Contract Begin Date, Contract End Date, Contract Months, Payoff Date, Frequency, Salary Concept, and Extract ID. A 'Reset' button is located at the top right of this section.
- Reset:** A section with checkboxes and dropdowns for resetting various employee data points, including Pay Status, Fiscal Year, Dock Rate, Unemployment Elig, Pre-Note, Health Ins Code, FSP Staff Data Code, TRS Member Pos, Annual Payments, Remaining Payments, WC Annual Payments, and WC Remaining Payments.
- Increment:** A section with checkboxes and dropdowns for incrementing specific data points, including Pay Step, Contract Begin Date, Contract End Date, Nbr Days Empld, # of Months in Contract, Contract Days, Local Contract Days, Payoff Date, Pay Grade, Local Schedule, Max Days, Hrs/Day, and Wkly Hrs Sched.
- Modify:** A section with checkboxes and dropdowns for modifying specific data points, including Contract Begin Date, Contract End Date, Nbr Days Empld, # of Months in Contract, Contract Days, and Payoff Date.
- Execute:** A button located at the bottom right of the interface.

☐ 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: ☒ 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** 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: 08-10-2020**

Unemployment Eligibility (ICESA Report): ☐ **Contract End Date: 06-04-2021**

Take Retiree Surcharge: ☐ # of Months in Contract:

NY Take Ret Surchg: ☐ Contract Days: 000 TRS - 1

Dock Rate:  Local Contract Days: 0

Unemployment Elig: ☐ **Payoff Date: 08-10-2021**

EIC Code: 1 Not elig ☐ Pay Grade:

Pre-Note (FSP Staff Salary Data): Yes ☐ Local Schedule:

Health Ins Code:  Max Days:

FSP Staff Data Code:  Hrs/Day: 0.000

Employment Type:  Wkly Hrs Sched: 0

Retiree Employment Type:  (Number of)

TRS Member Pos: ☐ 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: 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**

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 ☐ Local Schedule:

Health Ins Code:  Max Days:

FSP Staff Data Code:  Hrs/Day: 0.000

Employment Type:  Wkly Hrs Sched: 0

Retiree Employment Type:  (Number of)

TRS Member Pos: ☐ 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: 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

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

☐ Unemployment Eligibility (ICESA Report)
☐ Contract End Date

☐ Take Retiree Surcharge
☐ Nbr Days Empld

☐ NY Take Ret Surchg
☐ # of Months in Contract

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

Increment

☐ Pay Step
Limit:

☐ State Step
Limit 20

☐ Total (Prof) Experience
If Employment Date <

☐ District (Prof) Experience
If Employment Date <

Modify

Contract Begin Date:
From
08-12-2019
To
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

- 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.

- 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.

**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.



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