step11b

Table of Contents

Update staff data

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.

> ❌ **CAUTION**: 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 parameters used 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.

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.

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

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

future reference.

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

Example of **Reset**:

Example of **Increment**:

Example of **Modify**:

❏ 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.

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**. 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 parameters used 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.

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 parameters used for future reference.

❏ Under **Change Job Code to Another Code**:

If Job Code	Click ⌄ to select the job code to be changed.
Change To	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.

Back Cover