Post Import Procedures

> A Redesign Technical Setup and Migration Guide is available in an effort to consolidate the various pieces of our documentation relevant to setting up a new school on USXS-R.

There are a few processes that need to be setup and verified after the data has been imported before processing begins.

- **Go to System/Modules**

  -Click on the [+] to turn on **Email Notification Services**.

  -Click on the [+] to turn on **the Employer Distribution Module** (BRDDIS).

  -Click on the [+] to turn on **the Employer Retirement Share Module** (BRDRET) (if applicable).

  -Click on the [+] to turn on the **Http Notification Services**.

  -Click on the [+] to turn on the **Mass Change Service**.

  -Click on the [+] to turn on the **USAS Integration Module**.

  -Click the refresh button [C] for all changes to take affect.

- **Go to System/Configuration**

  -**Account Mapping Configuration**-Verify that setup matches setup in USPCON.

  -**Email Configuration**-Verify Port and SMTP Host data are accurate.

  -**Email Direct Deposit Notice Configuration**-Update the **From Email** field to contain the correct email address.

  -Verify that the **Employee Number Automatic Generation Configuration** matches EMPIDS_PREFS.INI file (if applicable).

-Click the refresh button [C] for all changes to take affect.

- **Go to Payments/Check Register**

  -Verify the highest check number matches highest check number in USPCON.

- **Go to Payments/Payroll Payments**

  -Verify the highest direct deposit number matches the highest direct deposit number in USPCON.

- **Go to Payments/Payee Payments**

 -Verify that the highest electronic transfer number matches the highest electronic transfer Number in USPCON.

- **Go to Reports/Leave Balance Report**

-Click on **Leave Balance Report**
-Choose **Sort By** option from drop down
-Choose **Page Break On** option from drop down
-Choose **Leave Report Options** from drop down
-Unselect any pay group you do not wish to appear on the report moving them to the **Available** box

-Click [**⬇ Generate Report**]
-Run BENRPT in classic using the same sort options that was used in the redesign and compare all leave totals on the **Leave Balance Report** with the **BENRPT**

- **Any corrections or adjustments can be made by going to CORE/LEAVES/ACCUMULATIONS**
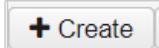
  -Click on [**+ Create**]
  -Employee- Find employee by typing in a few characters of first or last name then clicking on the employee name

  -Position-Select Position from drop down
  -Leave-Choose the type of leave from the drop down
  -Leave Unit-Should default to current leave unit (Daily /Hourly)
  -Description- Enter a description of what this adjustment is for (optional)
  -Length- Enter- the length days/hours this adjustment entry is for (ex. 1.00 or -1.00)
  -Transaction Date-Enter or select the date from the calendar for this transaction

  -Click [**✔ Save**]

- **Go to Reports/ODJFS New Hire Report**
  - Run and Check **ODJFS New Hire Report** to make sure no Template Import records (orphaned records) were imported.
    - If Template Import records are found, run ODJFS New Hire and create a file. Nothing will need to be done with the file. This will get rid of all of these records.

- **Go to Reports/W2 Report and Submission**
  -Run W2 Report and Submission and compare it to the Classic W2PROC/W2REPT for balancing.

- **Go to Reports/Quarter Report**
  -Run Quarter Report and compare it to the classic QRTRPT for balancing.
    - ****NOTE** - USPSR-3827 - Not handling voided/reissue checks correctly**
    - ****NOTE** - USPSR-3826 - Medicare/SS items not including board adjustments in QTD, YTD, and FTD totals-Release date**
    - ****NOTE** - USPSR-3790 - Payroll Item Summary totals not matching**

- **Go to CORE/EMPLOYEE**
  -Verify that there are no orphan records by checking grid to verify that there are not any records with a number and the Last Name is Template and First Name is Import. If found, change Number to a number that would be before the first employee number. (sort number on grid to find lowest number)

- **Go to CORE/EMIS ENTRY**
  -Verify that there are no employees with Long Term illness days. Go to More and add the Long Term Illness column to the grid. Then in the Long Term Illness column, search for any employees with >0 balances. These can the be removed under the EMIS Employee Entry by selecting the edit option and clearing out the Long Term Illness field. This field can also be cleared by using a MASS CHANGE procedure. Please contact your ITC for them to run this for you.
- **Go to Payroll/Future**
  -Verify that there are no orphan dock records that may have been imported from dock next pay field from classic. If an orphan record is found and should not be included delete this record from Future.

  > **The beginning Direct Deposit number in the redesign is set at 100000.**