

# Field Definitions

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## Attendance Detail Screen

- **Activity Date**
  - The date of the absence, accumulation, attendance, or adjustment.
- **Appointment Type**
  - Designated as either Certified or Classified.
- **Benefit Balances**
  - The amount of leave (Sick/Personal/Vacation) that an employee has accumulated.
- **Category**
  - Designated as one of the following:
    - Attendance
    - Calamity
    - Dock
    - EMIS Absence
    - EMIS Attendance
    - Holiday
    - Jury Duty
    - Military
    - ODJFS Adjustment
    - Other
    - Personal
    - Professional
    - Retirement Adjustment
    - Sick
    - Substituting
    - Unknown
    - Vacation
- **Deferred Posting Status**
  - Used to track the status of any Absence type entries that are posted to a category type of Sick, Vacation, or Personal. The flag indicates if the leave balance has been adjusted by the entry. The following values may be used:
    - "U"
      - Indicates a deferred absence entry which has not been posted. The leave balance has not been adjusted by this entry. These will show as Status = "D" on the Attendance Detail screen.
    - "I"
      - Indicates a deferred absence entry is "In Process" with the current payroll. The leave balance has been adjusted by this entry. These will show as "I" on the Attendance Detail screen.
    - "P"
      - Indicates the absence entry has been posted. The leave balance has been adjusted by this entry. For districts not using deferred posting, the Absence entry will be set to "P" upon entering the transaction on the Attendance Detail screen. For districts using deferred posting, the Absence entry will be set to "P" when CHKUPD is ran. These will show as status "P" on the Attendance Detail screen.
    - ""
      - Indicates an entry prior to the v4.2 conversion. These entries have all been "Posted" (leave balance has been updated). The Attendance Detail screen status field will be blank for these entries.
- **First Name**
  - The employee's first name.
- **Id Number**
  - The employee's identification number.
- **Job Number**
  - The job number associated with this entry.

- **Last Name**
  - The employee's last name.
- **Length**
  - The length of the absence, accumulation, adjustment, or attendance.
- **Middle**
  - The employee's middle name.
- **Pay Date**
  - The pay date associated with this entry.
- **Sub Category**
  - Can be used to further define the reason (or category) for the entry. User defined.
- **Suffix**
  - The employee's name suffix.
- **Transaction Type**
  - Designated as one of the following:
    - Absence
    - Accumulation
    - Adjustment
    - Attendance
- **Unit**
  - Designated as one of the following:
    - Days
    - Hours
- **USAS Posting Status**
  - Indicates whether the entry has been posted to the USAS files by LEVPRO.
- **USPS Posting Status**
  - Indicates whether the entry has been posted to the employee master file.

## Benefit Detail Screen

- **Accumulation Per Month**
  - The amount of leave units(Sick/Personal/Vacation) accumulated per period.
- **Advance Leave Used**
  - The amount of advanced sick leave used.
- **Balance**
  - The amount of leave (Sick/Personal/Vacation) that an employee has accumulated.
- **Deferred**
  - The amount of deferred leave (Sick/Personal/Vacation) that has accumulated. This field is used only for those districts who are set up to use deferred posting.
- **Employee Id**
  - The employee's identification number.
- **Maximum**
  - The maximum amount of leave (Sick/Personal/Vacation) that is allowed to be accumulated.
- **Maximum Advance Leave Allowed**
  - The maximum amount of advanced sick leave allowed.
- **Name**
  - The employee's name (includes first name, middle initial, last name, and suffix).
- **Reset Value**
  - The reset value for leave (Sick/Personal/Vacation).
- **Unit**
  - Indicates whether benefits are recorded as 'Hourly' or 'Daily.'

## Date Code Detail Screen

- **Date Code**
  - User defined code that is descriptive of the type of date the record represents.
- **Description**
  - Description of the type of date the record represents.

# Deduction Detail Screen

- **2nd Pay To Name**
  - A second optional payee name for the deduction checks.
- **2nd Street Address**
  - A second line of street address for the deduction company.
- **Abbreviation**
  - The abbreviated deduction company name that is printed on check stubs.
- **ACH Transfer Id**
  - This field is used with the Health Savings Account (HSA) annuity type. This field is optional. If you wish to create an ACH tape file for HSA accounts, then a valid ACH Id must be entered.
- **ACH Transfer Type**
  - This field is used with the Health Savings Account (HSA) annuity type. This field is optional. If you wish to create an ACH tape file for HSA accounts, then a valid ACH type must be entered.
- **Annuity Type**
  - Possible values include:
    - Other
    - Section 125 Health Savings Acct
    - Section 125 Non Wages
    - Section 125 Wages
    - Type-401A
    - Type-401K
    - Type-403B
    - Type-408K
    - Type-457
    - Type-501C
      - *For Section 125 annuities, please contact legal or tax advisors for information on processing.*
- **Assign to Job Level**
  - This field is used to be able to assign deductions to specific jobs.
- **Board Deductions to Tax**
  - The deduction code(s) for which the board paid amounts are to be taxed by the municipality (if the municipality taxes board paid amounts).
- **CCA Code**
  - The city tax code used for reporting to CCA (Central Collection Agency).
- **CCA Code Description**
  - The description of tax as defined by CCA (Central Collection Agency).
- **Cert. Object Code**
  - The account code that determines the board distribution of funds for certified employees.
- **City**
  - The city where the deduction company is located.
- **Class. Object Code**
  - The account code that determines the board distribution of funds for classified employees.
- **Code**
  - This must be a numeric value in the range 001 - 998
- **Designated Roth**
  - Applies only to 'Regular' type deductions; possible values are:
    - Contributions to 401K
    - Contributions to 403B
    - None
- **Electronic Remittance**
  - Indicates whether the deduction information will be transmitted electronically.
- **Exempt Annuities**
  - Indicates whether the city withholding taxes honors annuities.
- **Fax Number**
  - The fax number of the deduction company.
- **Honor Annuities:**
  - **125 Non Wages**
    - Indicates whether the city honors this type of annuity.
  - **125 Wages**

- Indicates whether the city honors this type of annuity.
  - **401A**
    - Indicates whether the city honors this type of annuity.
  - **401K**
    - Indicates whether the city honors this type of annuity.
  - **403B**
    - Indicates whether the city honors this type of annuity.
  - **408K**
    - Indicates whether the city honors this type of annuity.
  - **457**
    - Indicates whether the city honors this type of annuity.
  - **501C**
    - Indicates whether the city honors this type of annuity.
  - **Other Annuity**
    - Indicates whether the city honors this type of annuity.
- **Name**
    - The name of the deduction company to whom the deduction amount will be sent.
  - **OSDI**
    - The OSDI code of the district to which the payment is due. (Used for W2 processing only.)
  - **Other Object Code**
    - The account object code that defines board distribution of funds for other object codes.
  - **Pay To Name**
    - An optional payee name for the deduction check.
  - **Payment Cycle**
    - This field is used to code the payment cycle for deductions. Possible values are:
      - Every Payroll
      - Monthly
      - Quarterly
      - Annually
      - None
      - User Defined-1
      - User Defined-2
      - User Defined-3
      - User Defined-4
      - User Defined-5
      - User Defined-6
      - User Defined-7
      - User Defined-8
      - User Defined-9
  - **Phone Number**
    - The phone number of the deduction company.
  - **Print Board Amounts**
    - This field indicates whether board amounts should be printed on pay stubs.
  - **Required**
    - This field indicates whether this deduction code is required. Possible values are:
      - Not Required
      - May Be Required
      - Required
        - *Deductions marked as 'Not Required' will not appear on BRWSCN.*
  - **Rita Code**
    - The city tax code used for reporting to RITA (Regional Income Tax Authority).
  - **Rita Code Description**
    - The description of tax as defined RITA (Regional Income Tax Authority).
  - **State**
    - The state where the deduction company is located.
  - **State Id**
    - The state tax ID number used for W2 processing of other state taxes. (Used for W2 processing only.)
  - **Street Address**
    - The street address of the deduction company.
  - **Tax Board Amounts**
    - Indicates whether this municipality taxes board paid amounts.
  - **Tax Entity Code**
    - The entity code required for the magnetic tax reporting of cities. (Used for W2 processing only.)

- **Tax FICA Pickup**
  - The flag which indicates whether the city an employee is taxed by, taxes the medicare and FICA pickup.
- **Tax NonCash Earnings**
  - This field indicates whether this city deduction code taxes the values for the NonCash (NC) pay types.
- **Vendor**
  - The vendor number used by the BRDDIS program. The PAYDED program also uses this number to combine checks payable to the same deduction company.
- **W2Abbreviation**
  - The abbreviated deduction company name used on the printed W2 form.
- **Zip Code**
  - The zip code of the deduction company's address.

## EMIS Entry Screen

- **Important**
  - Please note that depending on the level of your security access you may or may not be able to view all of the following fields described.

### *Staff Demographic Fields*

- **Absence Days**
  - The number of absence days.
- **Attendance Days**
  - The number of attendance days.
- **Authorized Years**
  - The total number of years experience that the employee is authorized to claim.
- **Birth Date**
  - The birth date of this employee.
- **State Assigned ID**
  - For certificated employees, the Ohio Credential ID (License or Certificate #) should be entered to allow for proper EMIS reporting. For non-credentialed employees, the system will assign a Z-id when USPEMS/USPEMX is run.
- **Degree Type**
  - Represents the level of formal education the employee has completed.
    - Non Degree
    - Associate
    - Bachelors
    - Masters
    - Education Specialist
    - Doctorate
    - Other
    - Less Than High School Diploma
    - High School Diploma
    - GED Diploma
- **ECE Qualification**
  - This field indicates the degree major for employees of early childhood education programs.
    - Not Applicable
    - Child Development
    - Early Childhood Education
- **EMIS ID**
  - The employee's state staff ID. This is only required if the employee is reportable to EMIS and the SSN is not available.
- **Gender**
  - The gender of this employee.
    - Male - this employee is a man
    - Female - this employee is a woman
- **Long Term Illness**
  - The number of days missed that meet the necessary requirements to be considered long term illness.
- **Other Credentials**
  - This field is for persons hired for Early Childhood programs who do not have a certificate or degree. It allows the tracking of their credential status.
    - Not Applicable Working toward a CDA (Child Development Associate)
    - CDA Completed
    - No CDA and not working toward a CDA
    - Working toward a Associate Degree
- **Race/Ethnic Code**

- The employee's race.
  - Asian or Pacific Islander
  - Black, Non-Hispanic
  - Hispanic
  - American Indian or Alaskan Native
  - Multiracial
  - Not Specified
  - White Non-Hispanic
- **Hispanic/Latino**
  - This field specifies whether the employee is Hispanic or Latino.
- **White**
  - This field specifies whether the employee is White.
- **Black**
  - This field specifies whether the employee is Black.
- **Asian**
  - This field specifies whether the employee is Asian.
- **Amer Indian/Alaska Native**
  - This field specifies whether the employee is American Indian or Alaska Native.
- **Nat Hawaii/Pac Islander**
  - This field specifies whether the employee is Native Hawaiian or other Pacific Islander.
- **Report to EMIS**
  - This field determines if this employee is considered reportable to EMIS.
    - No - do not report this employee's information to EMIS
    - Yes - report this employee's information to EMIS
- **Semester Hours**
  - Valid for certified employees only; this represents the total number of semester hours of recognized college training that have been completed.
- **Total Years**
  - The employee's total number of years of experience. This field is intended to be used for tracking teaching experience for certificated staff.

***Staff Employment Fields***

- **Appointment Type**
  - The classification of the employee's position. Can be Certificated, Classified, Internship, Six hour lay teacher, or Veteran per ORC 3319.283.
- **Building IRN**
  - The information return number for the building in which the employee is working.
- **Employ./Start Date**
  - The employee's date of hire.
- **Exp. Current Class**
  - Indicates the total years of experience an employee has in their current position. This field is for certificated employees.
- **Extended Service**
  - The number of days for which extended service is claimed. This field is used only for certificated employees.
- **High Grade**
  - Used to report the highest grade level the employee is to teach or supervise. This is a required field for paraprofessionals hired under DPIA funding and is also desired for Principals and Assistant Principals.
- **HQPD**
  - High quality professional development, field is used to categorize those staff members which are required to participate in high quality professional development as defined by the No Child Left Behind Act of 2001 in Title IX, Section 9191(34)
- **Local Contract/Job**
  - The job number associated with this entry.
- **Low Grade**
  - Used to report the lowest grade level the employee is to teach or supervise. This is a required field for paraprofessionals hired under DPIA funding and is also desired for Principals and Assistant Principals.
- **Optional EMIS Contract Fields:FTE**
  - Contains the full time equivalency of the position assignment for EMIS reporting purposes. This is only required if the EMIS FTE differs from that in the 'Salary Schedule: FTE' field found on the Position screen.
- **Optional EMIS Contract Fields:Len. Wrk Dy/Hrs Dy**
  - Contains the number of hours worked per day on this job to be reported to EMIS. This is only required if the EMIS hours per day differs from that in the 'Hours Per Day' field on the Position screen.

- **Optional EMIS Contract Fields: Pay/Cont. Amount**
  - The contract amount to be reported to EMIS. This is only required if the contract amount wanting to be reported differs from the amount the system automatically calculates.
- **Optional EMIS Contract Fields: Work Days**
  - The number of EMIS work days for this job.
- **Position Code**
  - A code that is associated with the position assignment of the employee. A list of possible codes can be accessed through the pop-up field help for this field.
- **Position Funding: Assignment Area**
  - Defines the code of certain employees more completely in regards to funding.
- **Position Funding: Code**
  - The fund source from which the employee is paid for the position code indicated.
- **Position Funding: Percent**
  - The percentage from which the employee is paid from the corresponding fund source.
- **Position Status**
  - Identifies the employee's current employment relationship with the school board.
- **Position Type**
  - Used to identify the taxing option to be used when paying a supplemental job.
    - SUP1 - all amounts paid on this position will be taxed at the federal withholding rate for supplemental payments. When choosing this option, all annuity amounts for the employee are applied to the regular wages. No annuity amounts are applied to the wages that will be taxed at the federal supplemental withholding rate.
    - SUP3 - all amounts paid on this position will be taxed at the federal withholding rate for supplemental payments. When choosing this option all annuity amounts for the employee are applied to the wages being taxed at the supplemental withholding rate. No annuity amounts are applied to the regular wages.
    - If neither of these options apply to this position, the field should be left blank.
- **Qualified Parapro**
  - Indicates whether an instructional paraprofessional is required to meet the qualified paraprofessional requirements of the 2001 No Child Left Behind Act in FY2004 and whether or not those requirements have been met.
- **Report To EMIS**
  - States whether or not this job information should be reported to EMIS:
    - Yes - the employee job information should be reported to EMIS
    - No - the employee job information should not be reported to EMIS
- **Salary Amount**
  - Indicates where the job is placed on the salary schedule. This amount is for informational purposes.
- **Salary Type**
  - Can be Hourly, Annual, or blank.
- **Separation Date**
  - Used to indicate the date the employee separated from the position.
- **Separation Reason**
  - The reason that the employee is no longer performing this position.
- **Special Education FTE**
  - The full time equivalency for this position in regards to special education.

#### ***Contractor (CJ) Fields***

- **Job Number**
  - Any number from 01 to 99. The job record with this job number must exist in USPS.
- **Position Code**
  - The code associated with the position assignment of the employee.
- **District IRN**
  - The IRN of the resident/educating district contracting with the ESC or other EMIS reporting entity for a staff member in a specific position.
- **Position FTE**
  - The full-time equivalency of the position expressed as a percentage.

## **EMIS Contract Detail Screen**

- **Federal Tax ID**
  - A nine digit number that uniquely identifies an organization or an individual for federal tax purposes.
- **Position Code**

- The code that would have been assigned to an employee of the district who completed the work covered in this contract if the district had hired an employee instead of a contractor.
- **Local Contract Code**
  - A unique number assigned by the school district that differentiates among multiple contracts with the same contractor with the same position code.
- **Contractor Name**
  - Name of the contractor being reported.
- **Contract Amount**
  - The total dollar value of the contract for the current fiscal year (July 1-June 30).
- **Start Date**
  - The start date stated in the contract, even if the start date was in a prior fiscal year.
- **End Date**
  - The end date stated in the contract, even if the end date is in a future fiscal year.
- **Hours Per Week**
  - The total hours per week worked under this contract related to this position code.
- **Based on Service**
  - Indicates if the contract language requires specific services to be performed as a critical requirement of the contract.
- **Based on Hours**
  - Indicates if the contract language requires a specific number of hours of services to be performed as a critical requirement of the contract.
- **Based on People**
  - Indicates if the contract language requires a specific number of individuals to be provided as a critical requirement of the contract.
- **Fund Source**
  - The fund source from which this contract is paid.

## Employee Detail Screen

- **Important**
  - Please note that depending on the level of your security access you may or may not be able to view all of the following fields described.

### *Employee Identification Fields*

- **Employee ID**
  - The employee's identification number.
- **SSN**
  - The employee's social security number.
- **EMIS ID**
  - The employee's state staff ID. This is only required if the employee is reportable to EMIS and the SSN is not available.
- **Conceal**
  - This field controls whether an employee is considered concealed. If an employee is set as concealed they can be excluded from display in certain screens and reports.
    - No - Employee is not concealed.
    - Yes - Employee is concealed.

### *Employee Name and Address Fields*

- **First**
  - The employee's first name.
- **Middle**
  - The employee's middle name.
- **Last**
  - The employee's last name.
- **Suffix**
  - The employee's suffix if applicable. For example JR, SR, III. etc.
- **Street**
  - The address of the employee's residence.
- **Street 2**
  - This is a secondary address line. It can contain apartment or suite numbers, attention lines, etc.
- **City**
  - The city in which the employee resides.

- **State**
  - The state in which the employee resides.
- **Zip**
  - The employee's zip code.
- **Foreign Address**
  - This flag determines whether the employee's address is in a country other than the United States of America.
    - No - The employee does not have a foreign address
    - Yes - The employee does have a foreign address
- **Country**
  - The employee's country of residence. This field is not required if the employee resides in the United States of America.
- **Province**
  - The employee's province if applicable.
- **Postal Code**
  - The employee's postal code if applicable.

#### ***Employee Legal Name Fields***

- **First**
  - The employee's legal first name. This name will be used for printing on the employee's W2.
- **Middle**
  - The employee's legal middle name. This name will be used for printing on the employee's W2.
- **Last**
  - The employee's legal first name. This name will be used for printing on the employee's W2.
- **Suffix**
  - The employee's legal suffix if applicable. For example JR, SR, III. etc. This suffix will be used for printing on the employee's W2.

#### ***Employee Contact Information Fields***

- **Email**
  - The employee's email address.
- **Phone**
  - The employee's home or primary telephone number.
- **District Phone**
  - The employee's work telephone number.
- **Unlisted**
  - This field is used to represent whether the employee's home telephone number is unlisted.
    - No - The employee's telephone number is not unlisted
    - Yes - The employee's telephone number is un listed
- **District Extension**
  - The employee's work telephone extension.

#### ***Additional Employee Information Fields***

- **Eligible for Retirement**
  - This field is used to determine if the employee is eligible for retirement.
    - No - The employee is not eligible for retirement.
    - Yes - The employee is eligible for retirement.
- **Long Term Illness**
  - The number of days missed that meet the necessary requirements to be considered long term illness.
- **Report to EMIS**
  - This field determines if this employee is considered reportable to EMIS.
    - No - do not report this employee's information to EMIS
    - Yes - report this employee's information to EMIS
- **Gender**
  - The gender of this employee.
    - Male - this employee is a man
    - Female - this employee is a woman
- **OSDI Code**
  - The Ohio school district income tax code that applies to the employee if applicable.
- **Marital Status**
  - The employee's marital status.
    - Unstated - employee's marital status is not known

- Single - the employee is unmarried
- Married - the employee is married
- **Direct Deposit**
  - This field indicates whether the employee receives their pay through direct deposit.
    - No - Employee does not receive pay via direct deposit
    - Yes - Employee does receive pay via direct deposit
- **Spouse's First Name**
  - The first name of the employee's spouse if applicable.
- **Email Direct Deposit**
  - This field specifies whether the employee receives their direct deposit notice via e-mail.
- **Primary Race**
  - The employee's race.
    - Asian or Pacific Islander
    - Black, Non-Hispanic
    - Hispanic
    - American Indian or Alaskan Native
    - Multiracial
    - Not Specified
    - White Non-Hispanic
- **Hispanic/Latino**
  - This field specifies whether the employee is Hispanic or Latino.
- **White**
  - This field specifies whether the employee is White.
- **Black**
  - This field specifies whether the employee is Black
- **Asian**
  - This field specifies whether the employee is Asian
- **American Indian/Alaska Native**
  - This field specifies whether the employee is American Indian or Alaska Native.
- **Native Hawaiian/Pacific Islander**
  - This field specifies whether the employee is Native Hawaiian or other Pacific Islander.
- **Check Distribution**
  - Unique code used for sorting and selection of payroll checks.
- **Handicap Status**
  - Indicates whether or not the employee is handicapped.
    - No - The employee is not handicapped
    - Yes - The employee is handicapped
- **Degree Type**
  - Represents the level of formal education the employee has completed.
    - Non Degree
    - Associate
    - Bachelors
    - Masters
    - Education Specialist
    - Doctorate
    - Other
    - Less Than High School Diploma
    - High School Diploma
    - GED Diploma
- **Multilingual**
  - Indicates whether the employee is fluent in more than one language.
    - No - The employee is not multilingual
    - Yes - The employee is multilingual
- **ECE Qualification**
  - This field indicates the degree major for employees of early childhood education programs.
    - Not Applicable
    - Child Development
    - Early Childhood Education
- **Semester Hours**
  - Valid for certified employees only; this represents the total number of semester hours of recognized college training that have been completed.
- **Other Credentials**

- This field is for persons hired for Early Childhood programs who do not have a certificate or degree. It allows the tracking of their credential status.
  - Not Applicable
  - Working toward a CDA (Child Development Associate)
  - CDA Completed
  - No CDA and not working toward a CDA
  - Working toward a Associate Degree
- **Sub Days**
  - This field specifies the days of the week a substitute prefers to work.
- **ODHS New Hire Date**
  - This field specifies the date the employee was hired and is the date used for reporting to the Ohio Department of Human Services. If this field is left blank, the value in the Hire Date field will be entered by default.
- **Reported**
  - This field specifies whether the employee has been reported to the Ohio Department of Human Services.
    - No - Employee has not been reported to ODHS.
    - Yes - Employee has been reported to ODHS.

#### *Employee Date Fields*

- **Birth**
  - The birth date of this employee.
- **Last Evaluation**
  - The date of the last evaluation the employee has received.
- **Hire Date**
  - The employee's date of hire.
- **Next Evaluation**
  - The date of the employee's next scheduled evaluation.
- **Last Paid**
  - The last pay date on which the employee was paid. This field is updated by the system for each payroll the employee is paid in.
- **Contract Renewal**
  - The date on which the employee's contract was renewed.
- **Termination**
  - The date on which the employee's employment is considered terminated. This field is used to determine the length of the employment relationship when calculating service credit for STRS employees.
- **Limited Contract Expiration**
  - The date on which the employee's limited contract will expire.

#### *Employee Experience Fields*

- **Total**
  - The employee's total number of years of experience. This field is intended to be used for tracking teaching experience for certificated staff.
- **Ohio Public**
  - The number of years experience the employee has teaching in an Ohio public school.
- **Authorized**
  - The total number of years experience that the employee is authorized to claim.
- **Ohio Private**
  - The number of years experience that the employee has teaching in an Ohio private school.
- **Building**
  - The number of years experience that the employee has in their currently assigned building.
- **Non-Ohio Public**
  - The number of years experience that the employee has teaching in a public school in a state (or states) other than Ohio.
- **District**
  - The number of years experience that the employee has in their current school district.
- **Non-Ohio Private**
  - The number of years experience that the employee has teaching in a private school in a state (or states) other than Ohio.
- **Ohio Private**
  - The number of years experience that the employee has teaching in an Ohio private school.
- **Accredited District**
  - The number of years experience that the employee has at an accredited school district.

- **Military**
  - The number of years of qualifying military experience that the employee has.
- **Retirement System**
  - The number of years of qualifying experience the employee can claim in their current retirement system.
- **Trade**
  - The number of years of experience an employee has in a trade based craft.
- **Purchased**
  - The number of years of experience which the employee has purchased through their retirement system.

#### *Payroll User-Defined Fields*

- **Note**
  - The payroll user defined fields are meant to allow the tracking of any payroll information that you consider necessary. The four types of information allotted for are...
    - **Code**
      - These fields are intended to be used for tracking short codes that signify certain attributes of the employee. Currently you can add up to four of these codes.
    - **Money**
      - These fields are intended to be used for tracking monetary values relating to the employee. Currently you can add up to four of these money related fields.
    - **Date**
      - These fields are intended to be used for tracking important dates relating to the employee. Currently you can track up to two of these date related items.
    - **Text**
      - These fields are intended to be used for entering descriptions of information relating to the employee that is notable. Currently you can track up to two of these text based descriptions.

#### *Payroll User-Defined Fields*

- **Note**
  - The personell user defined fields are meant to allow the tracking of any personell information that you consider necessary. The four types of information allotted for are...
    - **Code**
      - These fields are intended to be used for tracking short codes that signify certain attributes of the employee. Currently you can add up to four of these codes.
    - **Money**
      - These fields are intended to be used for tracking monetary values relating to the employee. Currently you can add up to four of these money related fields.
    - **Date**
      - These fields are intended to be used for tracking important dates relating to the employee. Currently you can track up to two of these date related items.
    - **Text**
      - These fields are intended to be used for entering descriptions of information relating to the employee that is notable. Currently you can track up to two of these text based descriptions.

## Employee Date Detail Screen

- **Date**
  - The date that the user defined event occurred.
- **Date Code/Description**
  - User defined code that is descriptive of the type of date the record represents, along with the description that was entered when the code was created.
- **Date Wave Flag**
  - Gives the ability to wave a required date for anemployee. If a date code is created that all employees are required to have stored on file, but an employee has previously met the requirement at another district, for example, the requirement for the date can be waved.
    - No - the required date has not been waved for this employee
    - Yes - the required date has been waved for this employee
- **Comments**
  - Optional field used to enter additional information.

## Employee Deduction Detail Screen

#### *Federal*

- **Additional Withholding**
  - Enter additional federal tax withholding in a dollar amount, not a percentage.
- **Adoption Assistance**

- Enter the amount provided to an employee as a benefit for qualified adoption expenses. The amount in this field is treated as an excludable fringe benefit.
- **Calculate Option**
  - There are three possible options:
    - Calculate by IRS Tax Tables
    - Cumulative Wage Method
      - **Caution**
        - See USPS User Guide, Cumulative Wage Withholding Method for Federal Taxes before selecting this option.
    - Percentage of Gross
- **Dependent Care**
  - Enter the amount of dependent care assistance benefits. The amount in this field is treated as an excludable fringe benefit.
- **Earned Income Credit**
  - There are four possible options:
    - Employee Is Not Eligible
    - Employee Is Married Spouse Not Filing
    - Employee And Spouse Are Filing EIC
    - Employee Is Single And Filing EIC
- **Error Adjustment**
  - Used to make corrections for over or underwith holding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fringe Benefits**
  - Enter amount here to place fringe benefits on an employee's W-2.
- **Life Insurance Cost**
  - Whenever an employee receives \$50,000 or more in life insurance coverage paid for by the board, the cost of the insurance must be entered here.
- **Marital Status**
  - There are two possible options:
    - Single
    - Married
- **Moving Expenses**
  - Enter reimbursements, including payments made directly to a third party, for an employee's moving expense. The amount in this field is treated as an excludable fringe benefit.
- **Number of Exemptions**
  - The number of exemptions claimed for Federal Tax.
- **Pension Plan**
  - Indicates whether the Pension plan box on the W-2 be checked. There are three possible options:
    - Auto Check Per W2Proc Calculations
    - Yes Check The Pension Box
    - No Never Check The Pension Box
- **Tax Percent**
  - When the Percentage of Gross option is chosen as the calculate option, enter the percentage of gross that should be considered federal tax.
- **Third Party Sick Pay**
  - The total non-taxable third party sick pay amount will appear on the W-2 form in Box 13 with Code J (sick pay not included as income).
- **Vehicle Lease**
  - If applicable, enter the lease value of a vehicle provided to the employee. This amount will then be printed on the W2.
- **Accumulated Totals, Deductions, Gross Pay, Taxable Gross, Earned Income Credit**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals, Deductions, Gross Pay, Taxable Gross, Earned Income Credit**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals, Deductions, Earned Income Credit**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals, Deductions, Gross Pay, Taxable Gross, Earned Income Credit**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.
- **YTD Totals, Additional Withholding**
  - Displays the year to date additional withholding amount if applicable. This field is a subset of the YTD deduction amount. The regular deduction total can be calculated by subtracting the YTD additional withholding amount from the YTD deduction total.

- **Note**
- **Setting Up Ohio Tax Records for Non-Ohio Residents.**
  - Ohio Department of Job and Family Services requires reporting for employees even if they do not live in the state of Ohio.
    1. Add an Ohio deduction type record for all Non-Ohio residents.
    2. In the Calculate Option field, enter P - Percent of Gross and 0% in the Tax Percent field.
    3. In the ODJFS Wage Reporting field, enter Y.
    4. In the Stop field, enter a date prior to when the deduction will start.
- **Additional Withholding**
  - Additional state tax withholding can be entered. The amount entered should be a dollar amount, not a percentage.
- **Calculate Option**
  - There are two possible options:
    - Calculated By State Tax Tables
    - Percentage of Gross
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Number of Exemptions**
  - Enter the number of exemptions claimed for Ohio State Tax.
- **ODJFS Wage Reporting**
  - Indicates whether this employee should be included in ODJFS wage reporting.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Tax Percentage**
  - When the percentage of gross option is chosen as the calculate option, enter the percentage of gross that should be considered Ohio tax.
- **Accumulated Totals , Deductions , Gross Pay , Taxable Gross**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions , Gross Pay , Taxable Gross , ODJFS Gross**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay , Taxable Gross , ODJFS Gross**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.
- **YTD Totals , Additional Withholding**
  - Displays the year to date additional withholding amount if applicable. This field is a subset of the YTD deduction amount. The regular deduction total can be calculated by subtracting the YTD additional withholding amount from the YTD deduction total.

## City

- **Additional Withholding**
  - Enter additional city withholding in a dollar amount, not a percentage.
- **Employment/Residence**
  - If this City tax is reported using an agency such as RITA or CCA, enter the appropriate option in the Employment/Residence field. There are three possible options:
    - blank - the city tax is not reported using RITA or CCA
    - Employment - the city tax record is required because of the employee's place of employment
    - Residence - the city tax record is required because of the employee's place of residence
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Percentage of Gross**
  - Enter the amount of gross that is subject to the municipality tax
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**

- The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Tax Percentage**
  - The tax percentage of the municipality.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Taxable Gross*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Taxable Gross*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Deductions*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Taxable Gross*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.
- **YTD Totals** , *Additional Withholding*
  - Displays the YTD deduction amount. The regular deduction total can be calculated by subtracting the YTD additional withholding amount from the YTD deduction total.

#### **State**

- **Additional Withholding**
  - Enter additional state withholding in a dollar amount, not a percentage.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Tax Percentage**
  - The tax percentage of the state.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Taxable Gross*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Taxable Gross*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Deductions*

- Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay , Taxable Gross**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.
- **YTD Totals , Additional Withholding**
  - Displays the year to date additional withholding amount if applicable. This field is a subset of the YTD deduction amount. The regular deduction total can be calculated by subtracting the YTD additional withholding amount from the YTD deduction total.

## **SERS**

- **Board Error Adjustment**
  - Used to make corrections for over or underwith holding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fringe Benefits/Extra Compensation**
  - Yes - the deduction should be picked up as a fringe benefit and/or extra compensation
  - No - the deduction should not be picked up as a fringe benefit and/or extra compensation
- **New Employee**
  - Yes - this is a new employee
  - No - this is not a new employee
    - **Note**
      - After the RETIRE program is run to close for the month all employees flagged as "Y", will automatically change to "N".
- **Rehired Date**
  - Date that the retired employee was rehired.
- **Rehired Retiree**
  - Yes - the employee is retired from SERS or STRS
  - No - the employee has not retired from SERS or STRS
    - **Note**
      - It is important that the Rehired Retiree flag be correct as those already retired from SERS or STRS are reported differently.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Surcharge Exempt**
  - Yes - the employee is exempt from retirement surcharge
  - No - the employee is not exempt from retirement surcharge
- **Tax Percentage**
  - The portion of the deduction paid by the employee.
- **Accumulated Totals , Deductions , Board Share**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **MTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the RETIRE program has been used to close retirement for the month.
- **QTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions , Gross Pay , Board Share , Retiree Deductions , Retiree Gross , Retiree Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

## **STRS**

- **Board Error Adjustment**

- Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fringe Benefits/Extra Compensation**
  - Yes - the deduction should be picked up as a fringe benefit and/or extra compensation
  - No - the deduction should not be picked up as a fringe benefit and/or extra compensation
- **New Employee**
  - Yes - this is a new employee
  - No - this is not a new employee
    - **Note**
      - After the RETIRE program is run to close for the month all employees flagged as "Y", will automatically change to "N".
- **Rehired Date**
  - Date that the retired employee was rehired.
- **Rehired Retiree**
  - Yes - the employee is retired from SERS or STRS
  - No - the employee has not retired from SERS or STRS
    - **Note**
      - It is important that the Rehired Retiree flag be correct as those already retired from SERS or STRS are reported differently.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **STRS Advance Error Adj**
  - **Note**
    - This field only appears when a job has been advanced using STRSAD.
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Surcharge Exempt**
  - Yes - the employee is exempt from retirement surcharge
  - No - the employee is not exempt from retirement surcharge
- **Tax Percentage**
  - The portion of the deduction paid by the employee.
- **Accumulated Totals , Deductions , Board Share**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **Accumulated Totals , STRS Advance**
  - **Note**
    - This field only appears once a job has been advanced using STRSAD.
  - Contains the amount that has been processed, but not yet paid and/or reported to the deduction company. The field are cleared when PAYDED is processed for the deduction.
- **MTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **QTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions , Gross Pay , Board Share , Retiree Deductions , Retiree Gross , Retiree Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.

### **Annuity**

- **Account Number**
  - The employee's account number for the annuity.

- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount of the annuity can be deducted as a Fixed Amount or a Percentage.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Modified Date**
  - Date the deduction was last changed.
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
    - **Note**
      - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
      - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
      - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
    - **Note**
      - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , Deductions , Gross Pay , Board Share**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions , Gross Pay , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.

- **FYTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Annuitized SERS**

- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid. Corrections to the board share must be done manually.
- **Percentage**
  - The percentage of gross that should be deducted for this deduction.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , Deductions**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **MTD Totals , Deductions**
  - Are kept for the deduction record until the RETIRE program has been used to close retirement for the month.
- **QTD Totals , Deductions**
  - Are kept for the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions , Retired Deductions**
  - Are kept for the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Annuitized STRS**

- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid. Corrections to the board share must be done manually.
- **Percentage**
  - The percentage of gross that should be deducted for this deduction.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **STRS Advance Error Adj**
  - **Note**
    - This field only appears when a job has been advanced using STRSAD.
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.

- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , Deductions , STRS Advance**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **MTD Totals , Deductions**
  - Are kept for the deduction record until the RETIRE program has been used to close retirement for the month.
- **QTD Totals , Deductions**
  - Are kept for the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions , Retired Deductions**
  - Are kept for the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Annuitized STRS Buy Back**

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount of the annuitized STRS buy back can be deducted as a Fixed Amount or a Percentage.
- **Last Modified Date**
  - Date the deduction was last changed.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
    - **Note**
      - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
      - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
      - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect

- No - there is no maximum in effect
  - **Note**
  - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , Deductions , Gross Pay**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### *Regular*

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount can be deducted as a Fixed Amount or a Percentage.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
      - **Note**
      - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
      - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
      - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.

- **Stop Date**
    - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
  - **Set Maximum to Deduct**
    - Indicates whether there is a maximum amount to be deducted for the annuity.
      - Yes - there is a maximum in effect
      - No - there is no maximum in effect
        - **Note**
          - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , [*Deductions*] , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Board Pickup SERS Retirement**

- **Calculate Option**
  - This field controls whether an employee is considered concealed. If an employee is set as concealed they can be excluded from display in certain screens and reports.
    - No - Employee is not concealed.
    - Yes - Employee is concealed.
- **Board Pickup STRS**
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board Percentage**
  - The employee percent of the deduction paid by the board.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.

- **Accumulated Totals** , *Board Deductions* , *Retiree Board Deds*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **MTD Totals** , *Board Deductions*
  - Are kept on the deduction record until the RETIRE program has been used to close retirement for the month.
- **QTD Totals** , *Board Deductions*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Board Deductions* , *Retiree Board Deds*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Board Deductions*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Medicare/FICA**

- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding to the board share amount in previous payrolls. A negative amount in this field will cause the money to be paid back to the board and will reduce the amount the board pays to the deduction. A positive amount in this field will cause the error adjustment amount to be paid in addition to the regular board share amount the next time the employee is paid. This will increase the amount the board pays to the deduction.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Category**
  - Is either 'Medicare' or 'FICA.'
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid. Corrections to the board share must be done manually.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Tax Percentage**
  - The portion of the deduction paid by the employee.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Board Share* , *Taxable Gross*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Board Share* , *Taxable Gross*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Deductions* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Board Share* , *Taxable Gross*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Board Pickup Medicare/FICA**

- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board Percentage**
  - The employee percent of the deduction paid by the board.

#### **Start Date**

- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**

- *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , *Board Share***
    - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
  - **QTD Totals , *Board Share***
    - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
  - **FYTD Totals , *Board Share***
    - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.

**YTD Totals , *Board Share***

- Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

***Savings Bond***

- **Cost of Bond**
  - Enter the total cost of the savings bond.
- **Co-owner of Bond (SSN, First, MI, Last)**
  - The ID and name of the co-owner of the bond.
- **Deduction Amount**
  - The fixed amount to be withheld for the purchase of a savings bond.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Pay Cycle**
  - Savings bond deductions can be deducted on a specific pay(s) of the month by selecting the appropriate Pay Cycle.
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
- **Start Date**
  - Date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - Date is the pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Size of Bond**
  - Enter the denomination of the bond to be purchased.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers and/or letters.
  - *Code 2*
    - Can contain a numbers and/or letters.
  - *Text*
    - Can contain numbers and/or letters.
- **Accumulated Totals , *Deductions***
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.

- **QTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Direct Deposit**

- **Account Number**
  - Contains the account number to which the amount deducted on this record should be posted.
- **Deposit Amount**
  - Depending in the option chosen for the Fixed/Percent field, enter either a dollar amount or percentage.
- **Deposit Type**
  - There are 4 Deposit types available for direct deposit:
    - Automated Deposit Demand Credit Records
    - Prenotification of Demand Credit Authorization
    - Automated Deposit Savings Account Credit Records
    - Prenotification of Savings Credit Authorization
- **Fixed/Percentage**
  - The amount of the direct deposit can be deducted as a 'Fixed Amount' or a 'Percentage.'
- **Institution XREF**
  - A cross reference code that represents a bank institution routing number. When the Institution Xref is entered, the Institution Number will be entered automatically.
- **Institution Number**
  - Each financial institution has its own identification (routing) number. This identification number is entered in the Institutions Number field. When the Institution Xref is implemented, the institution identification number becomes nonmodifiable.
- **Start Date**
  - Date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - Date is the pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers and/or letters.
  - *Code 2*
    - Can contain a numbers and/or letters.
  - *Text*
    - Can contain numbers and/or letters.
- **Accumulated Totals , Deductions**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **OSDI**

- **Additional Withholding**
  - Additional state tax withholding can be entered in a dollar amount, not a percentage.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.

- **Number of Exemptions**
  - Enter the number of exemptions claimed for O.S.D.I Tax.
- **Start Date**
  - Date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - Date is the pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Tax Percentage**
  - The taxing percentage of the state
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers and/or letters.
  - *Code 2*
    - Can contain a numbers and/or letters.
  - *Text*
    - Can contain numbers and/or letters.
- **Accumulated Totals , *Deductions , Gross Pay , Taxable Gross***
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , *Deductions , Gross Pay , Taxable Gross***
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , *Deductions***
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , *Deductions , Gross Pay , Taxable Gross***
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.
- **YTD Totals , *Additional Withholding***
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

***Annuitized SERS Buy Back***

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount of the annuity can be deducted as a Fixed Amount or a Percentage.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Modified Date**
  - Date the deduction was last changed.
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay

- First and Second Pay
- Every Pay Including Third Pay
- First and Last Pay
  - **Note**
  - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
  - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
  - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
    - **Note**
    - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , [*Deductions*] , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

### **Medical Savings Account**

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount can be deducted as a Fixed Amount or a Percentage.

- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
      - **Note**
        - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
        - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
        - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
      - **Note**
        - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals , Deductions , Gross Pay , Board Share**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions , Gross Pay , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay , Board Share**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

### **Adoption Assistance**

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**

- Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
  - **Fixed/Percentage**
    - The amount of the annuity can be deducted as a Fixed Amount or a Percentage.
  - **Max. Deduction Amount**
    - An amount must be entered when there is a maximum deduct in effect
  - **Modified Date**
    - Date the deduction was last changed.
  - **Pay Cycle**
    - Annuities can be deducted on specific pays of the months by entering one of these possible values:
      - First Pay
      - Second Pay
      - First and Second Pay
      - Every Pay Including Third Pay
      - First and Last Pay
        - **Note**
          - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
          - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
          - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatic-ally.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
      - **Note**
        - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , [*Deductions*] , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Deductions* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Child Support**

- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Employt Terminated**

- Indicates whether the employment relationship with the district has ended.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **FIPS Code**
  - The Federal Information Process Standard code can be entered. This code identifies the county responsible for the employees support case. The code will be 5 characters when indicating state and county codes. It is 7 characters when indicating state, county and local codes. The first 2 characters (1-2) of the code represent the state the support order came from. The next 3 characters (3-5) represent the county. The remaining 2 characters (6-7) may be used for a local code.
- **Fixed/Percentage**
  - The amount of the annuity can be deducted as a Fixed Amount or a Percentage.
- **Insurance Available**
  - Indicates whether the employee has familymedical insurance available through the employer.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Old Case Number**
  - Used to identify the old, local county system. A limited number of counties have not yet completed their conversion to SETS. For those affected counties, an Old case number should be entered.
- **Order Number**
  - The court order number assigned by the judge or CSEA that enforces the obligation.
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
    - **Note**
      - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
      - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
      - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatic-ally.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
    - **Note**
      - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **SETS Case Number**
  - The Support Enforcement Tracking System can be entered. This ten digit number will always begin with a 7 and was assigned to the employee's support case during the conversion from local, independent county systems to SETS.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.
  - *Amount 2*
    - Can contain a number.
  - *Date*
    - Can contain a date.
  - *Code 1*
    - Can contain numbers/letters.
  - *Code 2*
    - Can contain numbers/letters.
  - *Text*
    - Can contain numbers/letters.

- **Accumulated Totals , Deductions , Gross Pay**
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals , Deductions**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals , Deductions , Gross Pay**
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

#### **Dependent Care**

- **Account Number**
  - The employee's account number for the annuity
- **Amount/Percentage**
  - Depending in the option chosen for the Fixed/Percentage field, enter either a dollar amount or percentage.
- **Board Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the board portion of the deduction. A negative amount in this field will give money back to the board the next time the employee is paid. A positive amount in this field will cause the board to pay more in addition to the regular deduction amount the next time the employee is paid.
- **Board's Share**
  - The portion of the deduction paid by the board.
- **Error Adjustment**
  - Used to make corrections for over or underwithholding of the deduction in previous payrolls. This field is used for corrections to the employee portion of the deduction. A negative amount in this field will give money back to the employee the next time the employee is paid. A positive amount in this field will withhold the amount in addition to the regular deduction amount the next time the employee is paid.
- **Fixed/Percentage**
  - The amount of the annuity can be deducted as a Fixed Amount or a Percentage.
- **Max. Deduction Amount**
  - An amount must be entered when there is a maximum deduct in effect
- **Modified Date**
  - Date the deduction was last changed.
- **Pay Cycle**
  - Annuities can be deducted on specific pays of the months by entering one of these possible values:
    - First Pay
    - Second Pay
    - First and Second Pay
    - Every Pay Including Third Pay
    - First and Last Pay
      - **Note**
        - Example 1: If the deduction is a fixed amount and 'First Pay' or 'First and Second Pay' selected, the deduction will be split between the first and second (or last) pay of the month.
        - Example 2: If the deduction amount is a percentage and 'First and Second Pay' or 'First and Last Pay' is selected, the deduction will be deducted both the first and second (or last) pay of the month.
        - Example 3: If the employee is paid monthly, the value of this field will automatically be set to 'First Pay.' Any other value entered for a monthly paid employee will be changed automatically.
- **Start Date**
  - The pay date of the payroll for which the deduction should start being deducted. More information on start dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Stop Date**
  - The pay date of the payroll for which the deduction should stop being deducted. More information on stop dates can be found in the "Start and Stop Dates" Chapter of the USPS User Guide.
- **Set Maximum to Deduct**
  - Indicates whether there is a maximum amount to be deducted for the annuity.
    - Yes - there is a maximum in effect
    - No - there is no maximum in effect
      - **Note**
        - This applies to the EMPLOYEE share only. If yes, the deduction will be taken out until the maximum has been reached. The maximum amount field is treated as a declining balance. Once the maximum amount reaches zero, the deduction becomes inactive and will not be withheld.
- **User-Defined Fields**
  - *Amount 1*
    - Can contain a number.

- *Amount 2*
  - Can contain a number.
- *Date*
  - Can contain a date.
- *Code 1*
  - Can contain numbers/letters.
- *Code 2*
  - Can contain numbers/letters.
- *Text*
  - Can contain numbers/letters.
- **Accumulated Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Contain the amounts that have been processed, but not yet paid and/or reported to the deduction company. The fields are cleared when PAYDED is processed for the deduction.
- **QTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the quarter.
- **FYTD Totals** , *Deductions* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the fiscal year.
- **YTD Totals** , *Deductions* , *Gross Pay* , *Board Share*
  - Are kept on the deduction record until the QRTRPT program has been used to close the payroll books for the calendar year.

## Job Detail Screen

- **Important**
  - Please note that depending on the level of your security access you may or may not be able to view all of the following fields described.
- **Amount**
  - Indicates where the job is placed on the salary schedule. This amount is for informational purposes. Amount and Obligation will differ when a change in the obligation is made for the current contract. In that case, the contract amount will be the full contract amount.
- **Amount Docked**
  - Total amount the job has been docked.
- **Amount Due**
  - The amount the employee has earned on this contract, but has not yet been paid. This field stores the accrued wages. The Amount Due is used when processing a pay off of accrued wages (POF pay type). Only those employees who are on stretch pay will have amounts in the amount due field.
- **Amount Earned**
  - The amount of the contract that has already been earned. Calculated by taking the Amount Paid plus the Amount Due plus the Amount Docked. The Amount Earned is updated with each payroll that the job is processed.
- **Amount Paid**
  - Amount paid to the employee through the payroll system, not including accrued wages
- **Appointment Type**
  - The classification of the employee's job. Can be Certificated or Classified.
- **Building Code**
  - The Building Code the job is worked in.
- **Building IRN**
  - The information return number for the building in which the employee is working.
- **Calendar Start**
  - The day on which the system will start counting information from the calendar. This day is automatically entered as the period beginning date of the first payroll in which the job is processed.
- **Calendar Stop**
  - The ending date that the system should use when calculating ODJFS weeks, EMIS days, and service credit. A calendar stop date should only be entered if wanting to stop the counting of days from the calendar and attendance entries for this job.
- **Calendar Type**
  - Job calendar the job is associated with. If the Calendar Type field is left blank, the job calendar for the job will be the one associated with the pay group. Should there not be a job calendar linked to the pay group, the job will be assigned to the default (blank) job calendar.
- **Check Stub Description**
  - This description will show up on the employee's check stub, rather than the description REGULAR, MISC., etc. The description can be 8 characters in length. This description is optional.
- **Code 1**
  - User defined field that can contain letters or numbers.
- **Code 2**

- User defined field that can contain letters or numbers.
- **Code 3**
  - User defined field that can contain letters or numbers.
- **Code 4**
  - User defined field that can contain letters or numbers.
- **Contract Start**
  - First day for which the current job is to be paid.
- **Contract Stop**
  - Last day for which the job is paid; optional.
- **Contract Type**
  - User defined, two character, optional field used to define type of contract.
- **CTD Amount**
  - The CTD Amount fields contain the amount of the Regular, Shift Premium, Overtime, Miscellaneous, and Dock units that have been paid to the employee for this job during the current contract. Also, included in this field is a CTD gross amount. The gross amount is the total of all the pay types in the previous fields.
- **CTD Units**
  - The CTD Units fields contain the number Regular, Overtime, Miscellaneous, and Dock units that have been paid to the employee for this job during the current contract.
- **Daily Rate**
  - The rate at which the employee should be paid per day. Calculated by taking Amount / Work Days. The daily rate can also be manually entered.
- **Date Of Last Raise**
  - The date that this job/employee was last given a raise.
- **Date 1**
  - Any valid date the district would like to keep on file.
- **Date 2**
  - Any valid date the district would like to keep on file.
- **Days Worked**
  - The number of days the employee has worked on this job.
- **Department Code**
  - The Department Code the job is worked in.
- **Dock Next Pay**
  - The amount to be subtracted from the gross pay amount the next time the job is paid. If deferred dock exists, it will be entered in this field. A dock amount may also be manually entered to cause the job to be docked with the next pay.
- **Emis Appointment Type**
  - The classification of the employee's position. Can be Certificated, Classified, Internship, Six hour lay teacher, or Veteran per ORC 3319.283.
- **Emis Contract Amount**
  - The contract amount to be reported to EMIS. This is only required if the contract amount wanting to be reported differs from the amount the system automatically calculates.
- **Emis FTE**
  - Contains the full time equivalency of the position assignment for EMIS reporting purposes. This is only required if the EMIS FTE differs from that in the 'Salary Schedule: FTE' field.
- **Emis Hours Per Day**
  - Contains the number of hours worked per day on this job to be reported to EMIS. This is only required if the EMIS hours per day differs from that in the 'Hours Per Day' field.
- **Emis Work Days**
  - The number of EMIS work days for this job. This is only required if the EMIS work days differs from that in the 'Work Days' field.
- **Equal Pays**
  - Indicates whether payments should be stretched over the number of pays or not.
- **Experience Current Class**
  - Indicates the total years of experience an employee has in their current position. This field is for certificated employees.
- **Extended Service**
  - The number of days for which extended service is claimed. This field is used only for certificated employees.
- **FYTD Amount**
  - The FYTD Amount fields contain the Regular, Shift Premium, Overtime, Miscellaneous, Dock units, and the total gross amount that have been paid to the employee for this job during the current fiscal year. Also shown is the total noncash earnings for the current fiscal year.

- **High Grade**
  - Used to report the highest grade level the employee is to teach or supervise. This is a required field for paraprofessionals hired under DPIA funding and is also desired for Principals and Assistant Principals.
- **Hourly Rate**
  - The rate at which the employee should be paid per hour. Calculated by taking Amount / (Work Days \* Hours Per Day). The hourly rate can also be manually entered.
- **Hours Per Day**
  - The number of hours the employee is regularly scheduled to work during a day. This field is used in calculating hourly rates and charging out absences through the program LEVPRO.
- **HQPD**
  - High quality professional development, field is used to categorize those staff members which are required to participate in high quality professional development as defined by the No Child Left Behind Act of 2001 in Title IX, Section 9191(34)
- **Job Number**
  - Any number from 01 to 99. There can not be duplicate job numbers for the same employee.
- **Job Status**
  - Reflects whether this job is Active or Inactive. Can also be used to indicate the employee who performed this job is Deceased or Terminated.
- **Job Title**
  - Description or title of the job.
- **Job Type**
  - Used to identify the taxing option to be used when paying a supplemental job.
    - SUP1 - all amounts paid on this job will be taxed at the federal withholding rate for supplemental payments. When choosing this option, all annuity amounts for the employee are applied to the regular wages. No annuity amounts are applied to the wages that will be taxed at the federal supplemental withholding rate.
    - SUP3 - all amounts paid on this job will be taxed at the federal withholding rate for supplemental payments. When choosing this option all annuity amounts for the employee are applied to the wages being taxed at the supplemental withholding rate. No annuity amounts are applied to the regular wages.
    - If neither of these options apply to this job, the field should be left blank.
- **Low Grade**
  - Used to report the lowest grade level the employee is to teach or supervise. This is a required field for paraprofessionals hired under DPIA funding and is also desired for Principals and Assistant Principals.
- **Money 1**
  - User defined field that can contain only numbers.
- **Money 2**
  - User defined field that can contain only numbers.
- **Money 3**
  - User defined field that can contain only numbers.
- **Money 4**
  - User defined field that can contain only numbers.
- **Number Of Pays**
  - Refers to the number of pays the job is contracted for.
- **Obligation**
  - The amount the board is obligated to pay the employee for the current contract.
- **Pay Group**
  - A group which is created based on likenesses in job calendars, titles, pay plans, etc. Examples of pay groups would be Administrators, Teachers, and Custodial Staff.
- **Pay Per Period**
  - Amount of pay the employee should receive on this job for each payroll. Used for equal pay employees. The Pay Per Period is calculated by taking the Obligation minus Amount Paid minus Amount Docked divided by the Number of Pays remaining in the contract.
- **Pay Plan**
  - The frequency by which the job is to be paid.
- **Pay Unit**
  - The method by which the employee is paid.
- **Pays Paid**
  - The number of pays that have been paid on the contract. This field is updated after each payroll in which the job is included.
- **Personal Leave**
  - Indicates whether the job is eligible for personal leave.
- **Position Code**

- A code that is associated with the position assignment of the employee. A list of possible codes can be accessed through the pop-up field help for this field.
- **Position Funding: Assignment Area**
  - Defines the code of certain employees more completely in regards to funding.
- **Position Funding: Code**
  - The fund source from which the employee is paid for the position code indicated.
- **Position Funding: Percent**
  - The percentage from which the employee is paid from the corresponding fund source.
- **Position Start Date**
  - The date on which the staff member began work in this position.
- **Position Status**
  - Identifies the employee's current employment relationship with the school board.
- **Position Type**
  - Identifies the type of the employment relationship with the board; Regular, Supplemental, or Temporary.
- **QTD Amount**
  - The QTD Amount fields contain the Regular, Shift Premium, Overtime, Miscellaneous, Dock units, and the total gross amount that have been paid to the employee for this job during the current quarter. Also shown is the total non-cash earnings for the current quarter.
- **Qualified Paraprofessional**
  - Indicates whether an instructional paraprofessional is required to meet the qualified paraprofessional requirements of the 2001 No Child Left Behind Act in FY2004 and whether or not those requirements have been met.
- **Report To EMIS**
  - States whether or not this job information should be reported to EMIS
    - Yes - the employee job information should be reported to EMIS
    - No - the employee job information should not be reported to EMIS
- **Retire Hours**
  - Indicates the SERS/STRS hours paid per day for retirement tracking purposes. If nothing is entered, the value in hours per day is used.
- **Retirement System**
  - SERS - School Employees Retirement System
  - STRS - State Teachers Retirement System
- **Retro Next Pay**
  - The amount to be added to the gross pay the next time the job is paid. If a retro situation is created in the new contract program, the retro amount can be placed in this field by the new contract program. A retro amount can also be entered manually. In either case the system will process the retro amount during the next payroll in which the job is included.
- **Salary Schedule: ID**
  - The schedule type for the salary schedule the employee is associated with. The ID can be between 1 and 6 characters in length.
- **Salary Schedule: Column**
  - Refers to which column the employee is in on the salary schedule.
- **Salary Schedule: Step**
  - The salary schedule step that the employee is on.
- **Salary Schedule: FTE**
  - The full time equivalency for this position in regards to a salary schedule.
- **Separation Date**
  - Used to indicate the date the employee separated from the position.
- **Separation Reason**
  - The reason that the employee is no longer performing this position.
- **Sick Leave**
  - Indicates whether the job is eligible for sick leave.
- **Special Education FTE**
  - The full time equivalency for this position in regards to special education.
- **Supervisor Id**
  - The ID of the employee who is the supervisor for this job.
- **Termination Date**
  - Date that this job was terminated.
- **Text 1**
  - User defined field that can contain numbers or letters.
- **Text 2**

- User defined field that can contain numbers or letters.
- **Vacation Leave**
  - Indicates whether the job is eligible for vacation leave.
- **Work Days**
  - The number of days the employee is contracted to work this job.
- **YTD Amount**
  - The YTD Amount fields contain the amount of the Regular, Shift Premium, Overtime, Miscellaneous, Dock units, and the total gross amount that have been paid to the employee for this job during the current calendar year. Also shown is the total non-cash earnings for the current calendar year.
- **YTD Units**
  - The YTD Units fields contain the number of Regular, Overtime, Miscellaneous, and Dock units that have been paid to the employee for this job during the current calendar year.

## Pay Account Detail Screen

- **Account Description**
  - Description of the USAS account code that is to be charged. This is an unmodifiable field.
- **Account Status**
  - Allows the user to set the status of the account. Options are:
    - Active
    - Inactive
    - Maximum amount in effect
    - Specific miscellaneous
- **Amount To Charge**
  - The percentage or fixed amount that is to be charged to this account. Whether a percentage or fixed amount is entered is dependent on what is entered in the Percent or Fixed field.
- **Board Dist. Account**
  - Indicates whether or not this is a board distributed account.
- **Fixed Or Percent**
  - Refers to the method by which this account is to be charged.
    - Fixed - indicates a specific dollar amount will be charged to the account.
    - Percent - indicates a percentage of gross will be charged to this account.
- **Function**
  - Contains the function component of the USAS account code that is to be charged.
- **Fund**
  - Contains the fund component of the USAS account code that is to be charged.
- **FYTD Amount Charged**
  - The amount that has been charged to this account for the fiscal year.
- **IL**
  - Contains the IL component of the USAS account code that is to be charged.
- **Job**
  - Contains the job component of the USAS account code that is to be charged.
- **Leave Projection**
  - This flag determines whether or not an account can be used by LEVPRO to charge out leave entered in Attendances and the job calendars to the corresponding leave accounts.
- **Maximum To Charge**
  - Contains a maximum dollar amount to be charged to a specific pay account. The maximum amount is set up as a declining balance method. This method reduces the maximum to charge field each payroll by the amount set up in the Amount to Charge field until the maximum amount is totally depleted. The system then begins to use the percentage rate accounts. This field operates only when using the fixed rate option and when the Account Status is set to 'Maximum amount in effect'. When the status is set to 'Maximum amount in effect' and the maximum to withhold equals zero, the account is inactive.
- **Object**
  - Contains the object component of the USAS account code that is to be charged.
- **OPU**
  - Contains the OPU component of the USAS account code that is to be charged.
- **Pay Start Date**
  - The payroll period beginning date of the payroll for which the pay account should start.
- **Pay Stop Date**
  - The payroll period ending date of the payroll for which the pay account should stop.

- **Pay Year To Date**
  - The amount that has been charged to this account for the calendar year.
- **SCC**
  - Contains the SCC component of the USAS account code that is to be charged.
- **Subject**
  - Contains the subject component of the USAS account code that is to be charged.
- **USAS Account Status**
  - The status of the account in USAS; Active or Inactive. This is a non-modifiable field.
- **XREF**
  - If XREF codes are utilized, a query may be performed for the XREF code entered in this field. XREF codes can be used to load a budget account instead of entering the entire budget account manually.

## UPDCAL-CUR and UPDCAL-FUT

- **Type**
  - Indicates the pay type for the pay amount record.
- **Units**
  - The number of units to be charged.
- **Rate**
  - The unit amount to be charged.
- **Description**
  - The description to be used on the check stub for miscellaneous payments.
- **Tax Option**
  - The tax option for MIS and TRM pay types and supplemental jobs with a Job type of SUP1 or SUP3.
- **Retirement**
  - Determines whether retirement is to be withheld from this payment.
- **Retire Hours**
  - The retire hours associated with the pay amount record.
- **Effective Date**
  - Effective date must be inclusive of payroll period beginning and ending dates to be included in payroll. If no effective date is specified, entry 128 will be included in next payroll.

### *Miscellaneous Pay Fields*

- **Amount**
  - The amount of miscellaneous payment to be charged to the specified USAS account code.
- **Board Dist**
  - Indicates whether this account is to be used for board distributions
- **Leave Proj**
  - Indicates whether this account is to be used for leave projections
- **Fund**
  - Contains the fund component of the USAS account code that is to be charged.
- **Function**
  - Contains the function component of the USAS account code that is to be charged.
- **Object**
  - Contains the object component of the USAS account code that is to be charged.
- **SCC**
  - Contains the SCC component of the USAS account code that is to be charged.
- **Subject**
  - Contains the subject component of the USAS account code that is to be charged.
- **OPU**
  - Contains the OPU component of the USAS account code that is to be charged.
- **IL**
  - Contains the IL component of the USAS account code that is to be charged.
- **Job**
  - Contains the job component of the USAS account code that is to be charged.

