# New Contracts

# **Note**If an employee's compensation is Archived, it will not be included in New Contracts

# New Contracts

The New Contracts program is designed to calculate and update new contract information for employees. Features of the program include:

- The ability to build new contracts from existing contracts

- Multiple mid-year contract changes with or without retroactive amounts

- Storage of historical contract information

- Activate of pay account data

- Activate data by pay group, contract start date, contract type (user defined), appointment type, and calendar type

- Multiple report sort options

- Auditing feature

- Mass delete option

- Build new contracts from an outside spreadsheet

> ⚠ For appropriate new contract calculations to occur, job calendars for the upcoming contract year need to be created before the new contract program is utilized to create new contracts.

# New Contract Maintenance

This option is used to **Copy, Delete** and **Activate** new contract data.  ***Note - You can delete or activate one or more contracts at a time*****

| | | | | Type | Employee # | Last Name | First Name | Position # | Position Description | Compensation Description | Compensation Label | Type | Description | Raise Date | Days Since Raise |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | |
| ☐ | 👁 | ✎ | ✿ ▶ | New contract | ANON111 | Workman | Dalton | 3 | Superintendent | | constantly | xzh | discovered | | 0 |
| ☐ | 👁 | ✎ | ✿ ▶ | Mid-contract with lump ... | ANON139 | William | Sue | 2 | Cook | | constantly | orn | automatically | | 0 |

+ Copy   ✎ Mass Change   ⊘ Delete   ▶ Activate        Q Advanced Query   ⬇ Report   ▤ More   ↻ Reset

# Copy

Find the employee you wish to create the new contract for by entering a couple of characters of the first or last name in the

Employee: [_____] ⌄

box and then clicking on that employee's name.

Find the compensation you will be adding the new contact for by clicking the down option in the Compensation box

Compensation [_____] ⌄

Choose the Contract Type from the drop down option in the Contract Type box

Contract Type [ New contract ] ⌄

The following four Contract Type options are available:

- Mid-contract with no retro
- Mid-contract with retro spread over remaining pays
- Mid-contract with lump sum Retro
- New contract

**Field Definition**

The N**ew Contract Type** field offers the following options:

- Mid-Contract with no retro
- Mid-Contract with retro spread over remaining pays
- Mid-Contract with lump sum retro
- New Contract

**New Contract**  +

Save | Cancel | Calculate | Clear

Employee: Elaine Olivia Richard
Position: 1 (Aide)
Compensation: discovered

Type
New contract

**Compensation**

| | | | |
|---|---|---|---|
| Job Calendar: ALL - ALL DAYS FOR | ☐ Archived | Raise Date | Days Since Raise: 0 | Type: Contract |
| Description | Label: discovered | Compensation Start Date: 8/9/21 | Compensation Stop Date: 8/10/22 | Pay Plan: Biweekly |
| Pay Unit: Hourly | Unit Amount (Automatically Calculated): 282.353 | ☐ Override Unit Amount calculation? | Retirement Hours: 0.00 | ☐ Strs Advance |
| Supplemental Tax Option: None | ☐ Archived | Contract Days Worked: 0.000 | Contract Work Days: 17.00 | Hours In Day: 8.00 |

☐ Primary Compensation

**Compensation Amounts**

| Accrued Wages | Amount Earned | Amount Paid | Amount Docked | Pays Paid |
|---|---|---|---|---|
| 0.00 | 0.00 | 0.00 | 0.00 | 0 |

**Contract**

| Pay Per Period (Automatically Calculated): 0.00 | ☐ Override Pay Per Period calculation? | Contract Amount: 38,400.00 | Contract Obligation: 38,400.00 | Contract Type |
|---|---|---|---|---|
| Pays In Contract: 27 | Retro Next Pay | ☐ Stretch Pay | | |

**Historical Context**

| Calendar Start Date: 7/31/95 | Calendar Stop Date |
|---|---|

**Salary Schedule**

| Salary Schedule Column: 0 | Salary Schedule Id | Salary Schedule Step: 0.00 |
|---|---|---|

**State Reporting**

☐ Reportable to EMIS    Local Contract Code

**Payroll Accounts (Only required if different than old Compensation**

| Expenditure Account | Rate Type | Status | Leave Projection | Employer Distribution | Charge Amount or Percent | Maximum | Sort Order |
|---|---|---|---|---|---|---|---|

+ Add Payroll Account

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***Compensation***

A compensation is linked to a job calendar through the **Job Calendar** type field. The calendar type is defined in the CORE/Job Calendars program.

The **Raise Date** field is used only for Mid-Year contract changes with retro (spread or lump sum). Enter the date the raise should have taken affect and the number of days **(Days Since Raise)** is calculated for you. Leave this field blank for a New Contract type.

The **Type** field is non-modifiable and displays the type of Compensation.

- Contract
- Non Contract
- Legacy

The **Description** is the title of the Position.

The **Label** field is used if a position has more than one compensation, a Label can be used to differentiate between them.

The **Compensation Start Date** is the start date of the current contract.  This date is a **required** field and is usually the first day for which the job is paid.  The contract work days are figured by using the Compensation Start and Stop dates and the Job Calendar selected.

The **Compensation Stop Date** is the stop date of the current contract.  This date is a **required** field.  The contract work days are figured by using the Compensation Start and Stop dates and the Job Calendar selected.

The frequency by which the job is to be paid is referred to as the **Pay Plan**.  This is a required field. There are 3 possible pay plans:

- Biweekly
- Semi-monthly
- Monthly

Option for the **Pay Unit** field are:

- Hourly
- Daily

The **Unit Amount**  *(Automatically Calculated)* field is the daily or hourly rate of the contract.  This field will be calculated based on the Contract values:

- The daily rate is calculated as follows:
    - CONTRACT AMOUNT / NUMBER OF DAYS IN CONTRACT = DAILY RATE
        - The hourly rate is calculated as follows:
    - CONTRACT AMOUNT / (NUMBER OF DAYS IN CONTRACT * HOURS PER DAY) = HOURLY RATE
        - In cases where there is not contract (i.e. substitutes), the amount can be manually entered.

The **Override Unit Amount calculation?** field is used if wanting to override the unit amount calculation.  Check the box to override.

The **Retirement Hours** field contains the hours the employee is to receive per day for SERS retirement purposes. The retire hours is used to automatically calculate an employees Regular pay type hours during the Payroll Processing and Payroll Payment Future and Current. This field is NOT a required field. If there is no value in the "Retire hours" field, Payroll Processing and Payroll Payments will use the value in Hours per day. If there is no value in either field, Payroll Processing and Payroll Payments will use 0.00 as the retirement hours value.

The **STRS Advance** field indicates whether the job is in the advanced mode.

The **Supplemental Tax Option** field is used to identify the taxing option to be used when paying a supplemental job.

- Three options are available:
  - **None** - Payment taxed as part of regular wages (uses regular tax rates)
  - **Apply Annuities to Regular** - 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.
  - **Apply Annuities to Supplemental** -  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.
- The taxing option selected will appear in Payroll payments, Current and Future and can be modified if necessary.  If neither of these options apply to this job, the field should be left blank.

  **\*\*For instance\*\*** if you choose "Apply Annuities to Supplemental" it will apply the applicable annuities to the supplemental wages first (assuming the employee also has regular wages on the same payroll). If there are then annuities "left over" after applying them to the supplemental wage amount, the remaining amounts will be applied to the regular wages. The opposite is true when the option to apply the annuities to regular wages is selected.

The **Contract Days Worked** field is the number of days the employee has worked on this job. Leave this field blank for a New Contract type.

The **Contract Work days** are the number of days the employee is contracted to work this job. This is a non-modifiable field. *Days calculated using Job Calendar and Compensation Start and Stop Dates.*

**Hours In Day** field contains 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 Leave Projection.

The **Primary Compensation** field - Not setup to be used in New Contract yet

### *Compensation Amounts*

The **Accrued Wages** is the amount the employee has earned on this contract, but has not yet been paid. This field stores the accrued wages. It is important that this field is correct for mid-year contract changes and using the POF (pay off of accrued) in Payroll Payments. Only those employees who are on stretch pay will have amounts in the Accrued Wages field. This field is non-modifiable.

The **Amount Earned** is the contract amount earned by the employee. The calculation is as follows:

- AMOUNT PAID + ACCRUED WAGES + AMOUNT DOCKED = AMOUNT EARNED

  This amount is updated with each payroll that the job is processed.

The **Amount Paid** which has been paid to the employee through the payroll system. It does not include accrued wages.

The **Amount Docked** field contains a running total of wages which are docked on the job.

### *Contract*

The **Pay Per Period** *(Automatically Calculated)* field is used for equal pay employees. It contains the pay amount the employee should receive on this job for each payroll. The pay per period is calculated as follows:

   CONTRACT OBLIGATION - AMOUNT PAID - AMOUNT DOCKED / NUMBER OF PAYS REMAINING IN CONTRACT = PAY PER PERIOD

The **Override Pay Per Period calculation?** option is used if wanting to override the Pay Per Period calculation.  Check the box to override.

The **Contract Amount** indicates where the compensation 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 through New Contract. In that case, the contract amount will be the full contract amount.

The **Contract Obligation** is the amount the board is obligated to pay the employee for the current contract.

The **Contract Type** field is a user defined field.

The **Pays In Contract** refers to the number of pays the job is contracted for.

**Pays Paid** is the number of pays that have been paid on the contract. This field is updated after each payroll in which the job is included. This field is non-modifiable.

The **Retro Next Pay** field can be used in two ways. One, if a retro situation is created in New Contract, the retro amount can be placed in this field by the New Contract program. Two, a retro amount can be manually entered. In either case the system will process the retro amount during the next payroll in which the job is included.

The **Stretch Pay** option indicates whether payments should be stretched over the number of pays or not.  Check if payments are to be stretched over the number of pays in the contract.

**Calendar Start Date** is 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 Date** is the ending date that the system should use when calculating ODJFS weeks, EMIS days, and service credit. Once the Compensation is Saved, the Calendar Stop Date will be entered automatically.  Leave blank until employee is no longer working at district.

*Salary Schedule*

**Salary Schedule Column** refers to which column the employee is in on the salary schedule.

**Salary Schedule ID** is 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 Step** is the salary schedule step that the employee is on.

*State Reporting*

Check if **Reportable to EMIS**

**Local Contract Code** (non-modifiable) EMIS Contracted Service (CC). Used for EMIS reporting. Automatically will populate when the Data collection is done.

*Payroll Accounts*

Click on **Add Payroll Accounts,** to add a new account for the employee

Select the **Expenditure Account** by clicking on the ⌄ or by entering in a portion of the account to narrow your search for Example: 001:
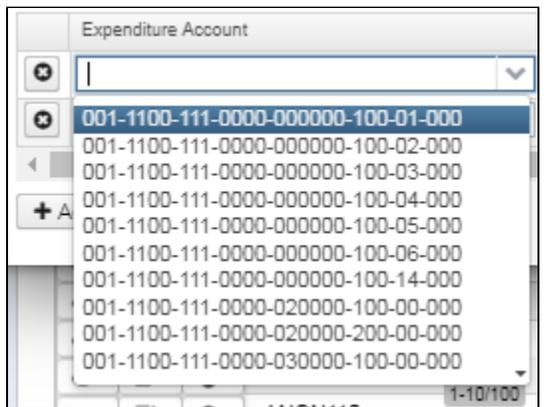


The **Rate Type** refers to the method by which this account is to be charged:

- **Percent** - indicates a percentage of gross to be charged to this account.
- **Fixed** - indicates a fixed dollar amount to be charged to the account:
  - Restrictions on the use of the Fixed Option are as follows:
    - The purpose of the Fixed Option is to accommodate special funding where a set amount is to be charged to a particular account for a job.
    - Pay accounts for each job must total 100 percent. **Therefore if a fixed rate is used, there must be at least one percentage rate record on file for the job totaling 100 percent.** Failure to have a percentage rate record or records totaling 100 percent will result in the job not being included in the payroll. Users will receive a warning message in this case.
    - Active fixed rate accounts for a job will be charged first. Once the fixed amount is charged, the active percentage rate account or accounts are then charged based on the percentages assigned.
    - Benefits (sick, vacation, jury duty etc.) will not be charged to a fixed amount account.

The **Status** allows the user to set the status of the account.  Options are:

- A - Active
- I - Inactive
- S - Specific Miscellaneous
- M - Maximum amount in effect. (Used with fixed rate option only.)

**Note: To determine whether an account is active or not the system will check both the Account Status field AND the Pay Start and Stop Dates. A pay account with an inactive status but with an active start date will NOT be charged.  A Pay Account with an active status with Start and Stop dates but the pay is outside these dates will NOT be charged.**

**Leave Projection** determines whether or not an account can be used by Leave Projection to charge out the leave entered in CORE/ATTENDANCE:

- Check if account should be used for Leave Projection?

- Leave blank if account should not be used for Leave Projection?

The **Employer Distribution** determines whether this is a Board Pay Account:

- Check if account should be used for Board Distribution?
- Leave blank if account should not be used for Board Distribution?

The **Charge Amount or Percent** is 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.

The **Maximum** to charge field contains a maximum dollar amount to be charged to a specific pay account. ***Note*** *If adding a Fixed amount and Maximum amount to charge, this will add Stop Date's to ALL the Old accounts for the employee***

- 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 `M' - Maximum amount in effect. When the status is set to 'M' and the maximum to withhold equals zero, the account is inactive.

The **Sort Order**
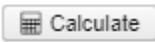
Click on ⊞ Calculate to **Recalculate** Contract Amounts

Click on ○ Clear to **Clear** New Contract fields

**Once all data is entered click on** ✔ Save **or to not save, click on** ⊘ Cancel

# Delete

This option deletes the new contract information from the New Contract maintenance file. If no specific selection options are entered, all new contracts will be deleted. A count of the number of contracts deleted will appear on the screen after the program runs to completion:





Or

Click on the ✪ next to the employee you are wanting to delete:



# Activate

⚠ If employee's compensation is set as Primary, when Activating New Contracts, it will then set the New Contract as Primary and unflagging the old.

⚠ Currently the maximum number of records that can be activated is 1,000

This option activates the new contract information into the Compensation and Payroll Account records, then deletes it from the New Contract maintenance file:



There is an option ☑ Lock in Pay Per Period? to have the **'Override Pay Per Period Calculation?'** automatically checked when activating New Contracts:

- If the box is checked, it will check all employee's 'Override Pay Per Period Calculation?' on their Compensation record
  - Locks in the override pay per period calculation that was entered in New Contracts
- If the box is unchecked, it will NOT check the employee's 'Override Pay per Period Calculation?' box on their Compensation record. But if the ☑ Override Pay Per Period calculation? box is already checked on the compensation record on the New Contract record, it will not uncheck this box during the Activation of New Contracts.

There is an option ☑ Transfer primary compensation flag to new compensations? to transfer the primary compensation flag to the new compensations when activating New Contracts:

- If the box is checked, it will transfer the primary compensation flag to new compensations on their Compensation record
- If the box is unchecked, it will NOT transfer the primary compensation flag to the new compensations on their Compensation record box on their Compensation record.





The Old and New Contracts will show under the employees Compensation:



# Example of Contract **Compensation** after New Contract Activate

Contract Compensation screen:

Employee: Langley, Jordan Rex
Employee Number: ANON176

Position Number: 5
Position Description: Superintendent

**Compensation**

| Type | Job Calendar | Description | Label | Compensation Start Date | Compensation Stop Date | Pay Plan | Pay Unit |
|---|---|---|---|---|---|---|---|
| Contract | zii - automatically | | constantly | 9/1/09 | | Semi-monthly | Daily |

Unit Amount: 33.529   ☐ Override Unit Amount calculation?   Retirement Hours: 0.00   ☐ Strs Advance   Supplemental Tax Option: None   Contract Days Worked:   Contract Work Days:   Hours In Day: 1.75

**Contract**

| Pay Per Period | Override Pay Per Period calculation? | Contract Amount | Contract Obligation | Contract Type | Pays In Contract | Pays Paid | Retro Next Pay |
|---|---|---|---|---|---|---|---|
| 0.00 | ☐ | 6,035.25 | 6,035.22 | | 0 | 0 | 0.00 |

☑ Stretch Pay

**Compensation Amounts**

| Accrued Wages | Amount Earned | Amount Paid | Amount Docked |
|---|---|---|---|
| 0.00 | 0.00 | 0.00 | 0.00 |

**Salary Schedule**

| Salary Schedule Column | Salary Schedule Id | Salary Schedule Step |
|---|---|---|
| 0 | | 10.00 |

**State Reporting**

☐ Reportable to EMIS   Local Contract Code: 

**Historical Context**

| Calendar Start Date | Calendar Stop Date | Contract Change/Extension Type | Contract Change/Extension Source |
|---|---|---|---|
| 7/11/94 | | Mid-contract with no retro | constantly (09/01/2009 - ?) |

# Mass Copy Compensations

This option is used to mass build new contracts into New Contract based upon pay groups and job status.

The new contract records will be created using the existing Compensation information. The following fields will be cleared or set to zero when the new contract record is built:

- Unit Amount
- Amount Paid
- Amount Docked
- Amount Earned
- Accrued Wages
- Contract Days Worked
- Contract Work Days
- Retro Next Pay

The total number of compensations added will be displayed in the processing window and a list of the employees selected upon program completion.



The **Job Status** field indicates whether the compensation is:

- Active
- Inactive
- Active and Inactive

To include **Concealed Employees**, check 

Include compensations active as of:

Enter a date to only **Include Active Compensations** in the Selected Compensation grid.  This will eliminate of including both old and new compensations for an employee.  The included compensations, active as of date, looks for compensations with a start date that is either empty, or before or equal the date entered AND a stop date that is either empty, or after or equal the date entered. If the compensation meets these criteria, then it is displayed in the grid. The grid updates when the date is changed.

**Select Pay Groups** options using the  to select **Available** Pay Groups to **Selected** Pay Groups.

Enter in the **Contract Start date** *(Compensation Start Date)*  and **Contract Stop Date** *(Compensation Stop Date)***.** The **Contract** *(Compensation)* **Start Date** is usually the first day for which the job is paid. These are a **required** fields used in the contract amount calculations.

Click on  to build the new contracts for the employees.

The New Contracts will then show in the **New Contract Maintenance** option:



Click on  to activate all contract information into the Compensation records, then deletes it from New Contract maintenance file.

# Import New Contracts

⚠ **\*\*Please be aware the header columns listed below are case sensitive\*\***

In order for the Import option to properly build new contract records, the data columns must contain a heading in Row One. The heading allows the Import program to determine what the data in that column represents. These headings must match what is defined below in order for the Import program to recognize and load the data.

There are four required fields: **employeeId**, **jobNo**, **contractType and** newC*ompensation.label- is only required if the employee has more then one Compensation for a Position.*  The remainder of the data is optional and will be dependent upon the contract type being imported. For example, if importing a mid-year contract change with retro-spread, the days since raise should also be included in the import file. Information not specified in the fields for the spreadsheet will be pulled in from the existing Compensation.

## Creating New Contract Compensations from Compensations

To create a template spreadsheet using the **Compensations** fields, which can assist in creating new contracts,  you can import this json file into **Reports -  New Contract Compensation Worksheet.rpd-json** With some manipulation to the spreadsheet this will then allow you to create new contracts using the **Import** option in **Processing/ New Contracts.**

After the spreadsheet has been created you can sort to obtain specific  **Pay Groups** and remove all others if desired, or can also sort the entire spreadsheet on **Compensation Start** and **Compensation Stop Dates** and then remove any records that will not require a new contract for the upcoming year.

⚠  The CSV cannot have any " ' " symbols present.  This would also be for any First or Last names with an apostrophe in it.

The data under the column header **CONTRACT_TYPE**  will need to be updated to **4** or **NewContract.** Also, any fields containing a **TRUE** or **FA LSE** value need to be changed to a **Y** or **N** value for the import to successfully load.

After all manual changes **Obligation**, **Amount**, **Start** and **Stop Dates**, **Contract Type**, **True/False** to **Y/N,** etc. have been made to the spreadsheet, save it as a csv file for proper importing into **Reports**.

ⓘ

## Redesign to Classic Fields and Descriptions

| Redesign | Redesign New Contract Screens | New Contract Description | Classic | Classic Screens | Classic New Contract Description |
|---|---|---|---|---|---|
| **employeeId** | Compensation | | EMPLOYEE_ID | | |
| **jobNo** | Compensation | Position# | JOB_NO | JOBSCN | Job# |
| **contractType** | | Type | CONTRACT_TYPE | | |
| **newCompensationLabel**<br><br>**Label is only required if the employee has more then one Compensation for a Position.** | Compensation | Label-current Label name | | JOBSCN | Check stub desc |
| calendarType | Compensation | Job Calendar | CALENDAR_TYPE | JOBSCN | Calendar type |
| raiseDate | | Raise Date | DAYS_SINCE_RAISE | | Days since raise |
| compensationDescription | Compensation | Description | | | Title |
| contractStartDate | Compensation | Compensation Start Date | CONTRACT_START_DATE | JOBSCN | Cont start |
| contractStopDate | Compensation | Compensation Stop Date | CONTRACT_STOP_DATE | JOBSCN | Cont stop |
| payUnit | Compensation | Pay Unit | PAY_UNIT | JOBSCN | Pay unit |
| *unitAmount* | Compensation | *Unit Amount (System Calculated on Import)* | | JOBSCN | Daily rate |
| retireHours | Compensation | Retirement Hours | RETIRE_HOURS | JOBSCN | Retire hours |
| | Compensation | *Accrued Wages (calculated field)* | | | |
| | Compensation | *Amount Earned (calculated field)* | | | |
| | Compensation | *Amount Paid (calculated field)* | | | |
| | Compensation | *Amount Docked (calculated field)* | | | |
| *payPerPeriod* | *Compensation* | *Pay Per Period (System Calculated on Import)* | | | |
| **contractAmount (required)** | Compensation | Contract Amount | CONTRACT_AMOUNT | JOBSCN | New contract |
| contractualObligation<br><br>(system will calculate this amount) | Compensation | Contract Obligation | CONTRACTUAL_OBLIGATION | JOBSCN | Obligation |
| userContractType | Compensation | Contract Type | USER_CONTRACT_TYPE | JOBSCN | Contract type |
| paysInContract | Compensation | Pays In Contract | PAYS_IN_CONTRACT | JOBSCN | '# pays |
| | Compensation | *Pays Paid (calculated field)* | | | |
| equalPays | Compensation | Stretch Pay | EQUAL_PAYS | JOBSCN | Equal pays |
| salaryScheduleColumn | Compensation | Salary Schedule Column | SALARY_SCHEDULE_COLUMN | | |
| salaryScheduleId | Compensation | Salary Schedule Id | SALARY_SCHEDULE_ID | | |
| salaryScheduleStep | Compensation | Salary Schedule Step | SALARY_SCHEDULE_STEP | | |

| | EMIS Entry/EMIS Contracted Service (CC) | *Local Contract Code (non-modifiable) Used for EMIS reporting. Automatically will populate when the Data collection is done.* | | | |
|---|---|---|---|---|---|
| calendarStartDate | Compensation | Calendar Start Date | CALENDAR_ START_DATE | JOBSCN | Calendar start |
| calendarStopDate | Compensation | Calendar Stop Date | CALENDAR_ STOP_DATE | JOBSCN | Calendar stop |
| | Compensation | *Contract Work Days (Calculated field)* | WORK_DAY S_IN_CONTR ACT | JOBSCN | Work days |
| hoursInDay | Compensation | Hours in Day | HOURS_IN_ DAY | JOBSCN | Hours per day |

## Import Fields and Values

The following is a list of valid import field and valid values

- **employeeId** (the SSN can be entered in this field using the **employeeId** header)

- **jobNo**

- **contractType -** *(Use the **Number** or **Contract Type** in the CSV file)*
    - **1-**Mid-year change with no Retro
    - **2**-Mid-year change with Retro spread over pays
    - **3**-Mid-year change with lump sum retro
    - **4 or NewContract** from existing Compensation

- ***newCompensationLabel***
    - **Label is only required if the employee has more then one Compensation for a Position.**
- firstName

- lastName

- newCompensationLabel

- calendarType

- raiseDate

- compensationDescription

- contractStartDate
    - If importing a New Contract (Contract-Type=4)  a Contract Start Date is needed to determine from the job calendar the work days associated with this position.

- contractStopDate
    - If importing a New Contract (Contract-Type=4)   a Contract Stop Date is needed to determine from the job calendar the work days associated with this position.
- payUnit
    - Hourly, H, or 1
    - Daily, D, or 2

- *unitAmount*
    - *Will be calculated for contracted jobs if Compensation start and Compensation Stop dates are populate*
    - If the unit amount is not on the csv for import. The unit amount is calculated any time the new contract is saved, so it will be calculated during import and then recalculated anytime the user changes anything on Compensation.

        The Override Unit Amount Calculation flag is not currently importable. You can choose to lock in the pay per period when you Activate, but not unit amount.

        The Override Unit Amount Calculation flag can be set through Mass Change or Mass Load after the contract has been imported on the Compensation.

        If the unit amount is on the csv and is imported to new contract then the Override Unit Amount Calculation flag on the Compensation will be set so that this field does not get recalculated on the Compensation screen.

- retireHours

- payPerPeriod

- contractAmount
  - **Required for stretch paid jobs**

- contractualObligation
  - *Calculated for contracted jobs*

- userContractType

- paysInContract

- retroNextPay (calculated field)

- equalPays
  - Y = Stretch paid
  - N = Not stretch paid

- salaryScheduleColumn

- salaryscheduleId

- salarySchdeduleStep

- calendarStartDate

- calendarStopDate

- hoursInDay
  - Required for contracted hourly jobs

# Example of an Import.csv:

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Type | contractType | employeeId | lastName | firstName | jobNo | positionDescription | compensationDescription | Label | raiseDate | contractAmount | equalPays | contractualObligation | contractStartDate | contractStopDate | | |
| 1 | | | | | | | | | | | | | | | | | |
| 2 | NewContract | 4 | ANON773 | BEST | REBECCA | 1 | STUDENT SERVICES SUI | 2018-2019 Contracts | discove | 7/1/2018 | 52780 | Y | 52780 | 7/1/2018 | 7/1/2019 | | |
| 3 | | | | | | | | | | | | | | | | | |

# Creating New Non Contract Compensations

To create new non contract compensation records a csv file with the appropriate header information defined can be loaded directly to Compensations using the **Mass Load/Compensation feature**.

# Import New Contracts option

Click on [Choose File] to search for **New Contract Import File**

Enter a default contract start date in the **Contract Start Date** field. This date will be used if a contract start date is not provided in the import file. This field can be left blank to pull in all New contracts.

Click on [Import] to Import the file into New Contract Maintenance option.

# Example of New Contract under New Contract Maintenance option:

# Mid Year Contract Change

**See Checklist USPS-R Mid Year Contract Change Checklist#RMidYearContractChangeChecklist**

## Mid-Contract With No Retro

Go to **Processing/New Contracts** and click on **Copy**

Find the Employee by typing a few characters of the first or last name or id. Find the Compensation using the drop down [∨] and choose the Contract Type from the drop down [∨] and click **+ Create**



Enter a new **Compensation Start Date-**The compensation Start and Stop dates **must** be specified - this is used to calculate the number of days in the new mid year contract. The **Compensation Start Date** will be the day after the last period ending date between old and new compensations, **not** the original start date of the contract. Example- the last pay processing range was from 8/1/18 - 8/15/18. The New **Compensation Start Date** on the Mid Year contract would be 8/16/18.  The **Compensation Stop** date should reflect the original Compensation Stop Date from the initial contract.

Add the mid year contract change amount in the **Contract Amount** field.- This is the full "new" amount of the contract (contract obligation will be calculated by the system.)

The pays paid for the mid year contract change will be zero and pays in contract will be how many pays are left to be paid.

Click **Calculate** to see the calculation of the Mid-Contract Change and then click **✔ Save**

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To activate one record click the ☐ next to the contract and then click ▶

To mass activate several contracts. Filter the contracts using the grid bringing up only contracts you wish to activate. Click the ☐ under the word Copy. All contracts should then be checked. Click ▶ Activate

> ⚠ When the new contract is activated it will automatically enter a Compensation Stop Date on the old contract record.

# Mid-Contract With Retro Spread Over Remaining Pays

Go to **Processing/New Contracts** and click on **Copy**

Find the Employee by typing a few characters of the first or last name or id. Find the Compensation using the drop down ⌄ and choose the Contract Type from the drop down ⌄ and click **+ Create**



The **Raise Date** must be specified - this in conjunction with start date tells us how many days were paid at the "wrong/old" rate for calculations. This date is when the employee should have actually started receiving the mid year contract pay.

Enter a new **Compensation Start Date-**The compensation Start and Stop dates must be specified - this is used to calculate the number of days in the new mid year contract. The **Compensation Start Date** will be the day after the last period ending date between old and new compensations, **not** the original start date of the contract. Example- the last pay processing range was from 8/1/18 - 8/15/18. The New **Compensation Start Date** on the Mid Year contract would be 8/16/18.  The **Compensation Stop** date should reflect the original Compensation Stop Date from the initial contract.

Add the mid year contract change amount in the **Contract Amount** field.- This is the full "new" amount of the contract (contract obligation with retro spread will be calculated by the system.)

The pays paid for the mid year contract change will be zero and pays in contract will be how many pays are left to be paid.

Click [🖩 Calculate] to see the calculation of the Mid-Contract Change and then click [✔ Save]

⚠ The contract obligation field will reflect "what is yet to be paid", not including what was paid on the old compensation.

The **Days Since Raise** field will be automatically populated, utilizing the raise date, when the Calculate button is clicked.

The "new compensation" record only represents the contract from the contract change forward (for mid-year contract changes) - so the days in contract will be reduced by the days worked on the old contract.



To activate one record click the [ ] next to the contract and then click [▶]

To mass activate several contracts.  Filter the contracts using the grid bringing up only contracts you wish to activate.  Click the [ ] under the word Copy. All contracts should then be checked. Click [▶ Activate]

⚠ When the new contract is activated it will automatically enter a Compensation Stop Date on the old contract record.

# Mid-Contract With Lump Sum Retro

Go to **Processing/New Contracts** and click on **Copy**

Find the Employee by typing a few characters of the first or last name or id. Find the Compensation using the drop down [⌄] and choose the Contract
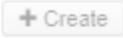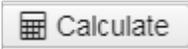
Type from the drop down [⌄] and click [+ Create]

Create New Contract from existing Compensation

| | |
|---|---|
| Employee: | [⌄] |
| Compensation | [⌄] |
| Contract Type | Mid-contract with lump sum retro [⌄] |
| | + Create |

The **Raise Date** must be specified - this in conjunction with start date tells us how many days were paid at the "wrong/old" rate for calculations. This date is when the employee should have actually started receiving the mid year contract pay.

Enter a new **Compensation Start Date-**The compensation Start and Stop dates must be specified - this is used to calculate the number of days in the new mid year contract. The **Compensation Start Date** will be the day after the last period ending date between old and new compensations, **not** the original start date of the contract. Example- the last pay processing range was from 8/1/18 - 8/15/18. The New **Compensation Start Date** on the Mid Year contract would be 8/16/18.  The **Compensation Stop** date should reflect the original Compensation Stop Date from the initial contract.

Add the mid year contract change amount in the **Contract Amount** field.- This is the full "new" amount of the contract (contract obligation and retro amount will be calculated by the system.)

The pays paid for the mid year contract change will be zero and pays in contract will be how many pays are left to be paid.

Click [⊞ Calculate] to see the calculation of the Mid-Contract Change and then click [✔ Save]

> ⚠ The contract obligation field will reflect "what is yet to be paid", not including what was paid on the old compensation.
>
> The **Days Since Raise** field will be automatically populated, utilizing the raise date, when the Calculate button is clicked.
>
> The "new compensation" record only represents the contract from the contract change forward (for mid-year contract changes) - so the days in contract will be reduced by the days worked on the old contract.

To activate one record click the [  ] next to the contract and then click [ ▶ ]

To mass activate several contracts. Filter the contracts using the grid bringing up only contracts you wish to activate. Click the [  ] under the word Copy. All contracts should then be checked. Click [ ▶ Activate ]

> ⚠ When the new contract is activated it will automatically enter a Compensation Stop Date on the old contract record.

# Mid-Year Contract Change Calculations

New Compensation Pays in Contract equals Old Compensation Pays in Contract minus Old Compensation Pays Paid
Amount to be Earned equals ((Old Compensation Contract Work Days minus Old Compensation Contract Days Worked) times New Compensation Daily Rate)
Retro Amount equals (New Compensation Daily Rate minus Old Compensation Daily Rate) times Days Since Raise
New Compensation Amount Earned equals Old Compensation Accrued Wages
New Compensation Contract Obligation equals Amount to be Earned plus Old Compensation Accrued Wages

## If doing No Retro, no further calculations are necessary

New Compensation Pays in Contract equals Old Compensation Pays in Contract minus Old Compensation Pays Paid
Amount to be Earned equals ((Old Compensation Contract Work Days minus Old Compensation Contract Days Worked) times New Compensation Daily Rate)
New Compensation Amount Earned equals Old Compensation Accrued Wages
New Compensation Contract Obligation equals Amount to be Earned plus Old Compensation Accrued Wages

## If doing Retro Spread Over Remaining Pays:

New Compensation Pays in Contract equals Old Compensation Pays in Contract minus Old Compensation Pays Paid
Amount to be Earned equals ((Old Compensation Contract Work Days minus Old Compensation Contract Days Worked) times New Compensation Daily Rate)
Retro Amount equals (New Compensation Daily Rate minus Old Compensation Daily Rate) times Days Since Raise
New Compensation Amount Earned equals Old Compensation Accrued Wages
New Compensation Contract Obligation equals Amount to be Earned plus Old Compensation Accrued Wages

Add Retro Amount to New Compensation Amount Earned
Add Retro Amount to New Compensation Contract Obligation

## If doing Retro Lump Sum:

If Contract is Stretch Pay:

New Pay Per Period equals New Compensation Contract Amount divided by Old Compensation Pays in Contract
Pay Per Period Difference equals New Pay Per Period minus Old Compensation Pay Per Period
If Days Since Raise is equal to the Old Compensation Contract Days Worked:

Lump Sum Retro equals Pay Per Period Difference times Old Compensation Pays Paid

Otherwise:

Multiplier equals 10 for Biweekly and 11 for Semi-monthly
Lump Sum Retro equals Pay Per Period Difference times (Days Since Raise divided by Multiplier)
Accrued Retro equals Retro Amount minus Lump Sum Retro
Add Accrued Retro to New Compensation Amount Earned
New Compensation Retro Next Pay equals Lump Sum Retro

If Contract is NOT Stretch Pay:

New Compensation Retro Next Pay equals Retro Amount

New Compensation Pays in Contract equals Old Compensation Pays in Contract minus Old Compensation Pays Paid
Amount to be Earned equals ((Old Compensation Contract Work Days minus Old Compensation Contract Days Worked) times New Compensation Daily Rate)
Retro Amount equals (New Compensation Daily Rate minus Old Compensation Daily Rate) times Days Since Raise
New Compensation Amount Earned equals Old Compensation Accrued Wages
New Compensation Contract Obligation equals Amount to be Earned plus Old Compensation Accrued Wages

Add Retro Amount to New Compensation Contract Obligation

# Report Creation

To create a report from the Grid, please click on the Report documentation link to find the How to Steps: **Report**