

PeopleSoft

Summer Months and Short Work Break

Version 1.0 | Updated June 4, 2019



PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

Copyright ©2019, San Diego County Board of Education.

This document may be reproduced internally at the San Diego County Office of Education for the San Diego Board of Education. Except as noted, no part of the publication may be reproduced, transcribed, stored in retrieval systems, or translated into any language in any form by any means without the written permission of the San Diego County Board of Education, 6401 Linda Vista Road, San Diego, CA 92111-7399.

For additional information about this publication please contact Peyri Herrera, Customer Resource Center Director.
Contact information: pherrera@sdcoe.net, (858) 569-5463.

Contents

Contents	i
Part I: Overview	1
About This Guide	2
Short Work Break (SWB) Explained.....	3
Part II: Summer Months	4
Summer Payroll Paysheet Creation Dates	5
Pay Schedule Checkboxes.....	6
SWB Rows in Job Data	7
Part III: Auditing Data of 10 and 11 Month Employees.....	8
Part IV: Working with Data During Summer Months	10
Entering Time for 10 and 11 Month Employees on SWB.....	11
Changes to Job Data during Short Work Break	12
Delayed Net Pay (DNP).....	15
Additional Pay Reminders	16
Override Additional Pay Reminders	17
Queries	18

Part I: Overview

About This Guide

This guide was created by the SDCOE Customer Resource Center for staff responsible for Human Resources and Payroll. It covers how to work with data of 10 and 11 month employees that are not paid their monthly pay during the summer months.

For additional copies of this guide, please go to <http://crc.sdcoe.net/resources/peoplesoft/guides>.

Short Work Break (SWB) Explained

EMPLOYEES AFFECTED

Short Work Break (SWB) affects **only Monthly Salaried 10 and 11 Month Employees.**

Each month a **Paysheet** is created for each monthly employee as part of the Paysheet creation process. The date that this process runs fluctuates each month but can be found on the Payroll Processing Schedule Calendar. During the summer months the Paysheet Creation Process continues to run and produce Paysheets for 12 month employees **but for employees that are set up as 10 or 11 months, the process runs differently.**

Example: July 2019 Payroll Processing Schedule Calendar

Payroll/Off Cycle Processing Schedule - F/Y 2019/2020					
PEOPLESOFT					
JULY 2019					
Day	Tuesday	Wednesday	Thursday	Friday	Saturday
	2	3	4	5	6
	2PM - OFF TL Entries 3PM-4:30 - OFF Edits	TL - APRV	HOLIDAY Independence Day	Issue OFF Warrants M07 Paysheets Available EX HRLY LOAD* TL - APRV,LOAD AM - APRV	

July paysheets get created and SWB rows are entered on Job Data of 10 and 11 Month Employees.

A 10 or 11 month employee set up involves selecting the specific month(s) that the employee is not to be paid. This is done by unchecking the boxes of the months in Job Data (Job Data > SDCOE Job Data tab) for the months that the employee should not receive a paycheck. Unchecking the box is not solely what stops pay, it is merely what the system looks at when the Paysheet creation process runs. It's at this point that the unchecked box for the corresponding month does its job. It indicates to the system that a Paysheet should not be created for this employee. **So, rather than creating a paysheet for this employee, the system inserts a row in Job Data that indicates the employee is on SWB.**

The SWB row in Job Data puts the employee in non-paid status but keeps the employee in active HR status.



EXAMPLE: SWB ROW

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Work Location: [Redacted] Find: First 1 of 11 Last

*Effective Date: 07/01/2019

Effective Sequence: 0

HR Status: Active

Payroll Status: Short Work Break

*Action: Short Work Break

Reason: Schedule

*Job Indicator: Primary Job

Position Number: 10611400

IMPORTANT: SWB can have an effect on Timesheets, Retro Payments, Position Actions, and Job Data Actions.

Return from Short Work Break: In the subsequent month the Paysheet Creation Process again reviews the pay schedule and if the employee is scheduled to be paid it 'returns' them from the Short Work Break. The return activates the employee so that a paysheet will be created for them.

Part II: Summer Months

Summer Payroll Paysheet Creation Dates

NOTE: Paysheet Creation Process runs at close of business on the following dates for 2019 Summer Months:

Payroll/Off Cycle Processing Schedule - F/Y 2018/2019
PEOPLESFT

JUNE 2019

June paysheets get created and SWB rows are entered on Job Data of 10 and 11 Month Employees.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1
	4	5 Issue OFF Warrants M06 Paysheets Available EX HRLY LOAD* TL- APRV	6	7	8
tries	TL- APRV	TL- APRV	TL- APRV	TL- APRV, LOAD	

Payroll/Off Cycle Processing Schedule - F/Y 2019/2020
PEOPLESFT

JULY 2019

July paysheets get created and SWB rows are entered on Job Data of 10 and 11 Month Employees.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	2	3	4	5 Issue OFF Warrants M07 Paysheets Available EX HRLY LOAD* TL - APRV,LOAD AM - APRV	6
	2PM - OFF TL Entries 3PM-4:30 - OFF Edits	TL - APRV	HOLIDAY Independence Day	TL - APRV,LOAD AM - APRV	

August paysheets get created and SWB rows are entered on Job Data of 10 and 11 Month Employees.

Payroll/Off Cycle Processing Schedule - F/Y 2019/2020
PEOPLESFT

AUGUST 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1		2
				2PM - OFF TL Entries 3PM-4:30 - OFF Edits		TL - A
				OFF Confirm		Cancel
	4	5 Issue OFF Warrants M08 Paysheets Available EX HRLY LOAD* TL- APRV	6	7	8	9
	TL- APRV	TL- APRV	TL- APRV	TL- APRV	TL- APRV	TL- A

Pay Schedule Checkboxes

In the example below, the employee is set up as an 11 month employee that is not to receive pay in July. By having the July checkbox unchecked prior to Paysheets being created for July payroll, a paysheet will not be generated for this employee. Instead, a SWB row will be inserted in Job Data with an Effective Date of 07/01/2019.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation	SDCOE Job Data
EXAMPLE: 11 MONTH EMPLOYEE						
Employee		Empl ID		Empl Record 0		
SDCOE Job Data ? Find View All First 1 of 10 Last Go To Row						
Effective Date 07/01/2018		Unchecked box indicates that the employee should not be paid in July.		Action Return from Work Break		
Effective Sequence 2				Reason Schedule		
HR Status Active				Job Indicator Primary Job		
Payroll Status Active				Current		
Retirement						
<input type="checkbox"/> Greater than 20 Hours Sched?		FICA Status Override		CDays 188.00		
<input type="checkbox"/> Ignore in Rtrmt Enrlmt Process		CC Class Code 02		Teacher Hours 7.00		
Pay Schedule						
<input checked="" type="checkbox"/> January	<input checked="" type="checkbox"/> April	<input type="checkbox"/> July	<input checked="" type="checkbox"/> October			
<input checked="" type="checkbox"/> February	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> August	<input checked="" type="checkbox"/> November			
<input checked="" type="checkbox"/> March	<input checked="" type="checkbox"/> June	<input checked="" type="checkbox"/> September	<input checked="" type="checkbox"/> December			

Since July is the only month unchecked, the employee will only be on SWB for the month of July. After July Payroll processes the employee will be returned from SWB during the Paysheet Creation Process for August.

SWB Rows in Job Data

Once the SWB row is entered on Job Data by the Paysheet Creation Process it is critical that ALL changes to Position and Job Data be suspended until the Return from SWB row is entered. The examples below are what the SWB row and Return from SWB row will look like in Job Data.

SWB

NOTE: The Effective Date of the SWB row are dependent on which Pay Schedule Flags are unchecked on the Job Data record of the employee. If the first month unchecked is:

- **June:** Effective Date of SWB will be 06/01/2019
- **July:** Effective Date of SWB will be 07/01/2019
- **August:** Effective Date of SWB will be 08/01/2019



EXAMPLE: SWB ROW

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Work Location: [Redacted] Find: First 1 of 11 Last

*Effective Date: 07/01/2019

Effective Sequence: 0

HR Status: Active

Payroll Status: Short Work Break

*Action: Short Work Break

Reason: Schedule

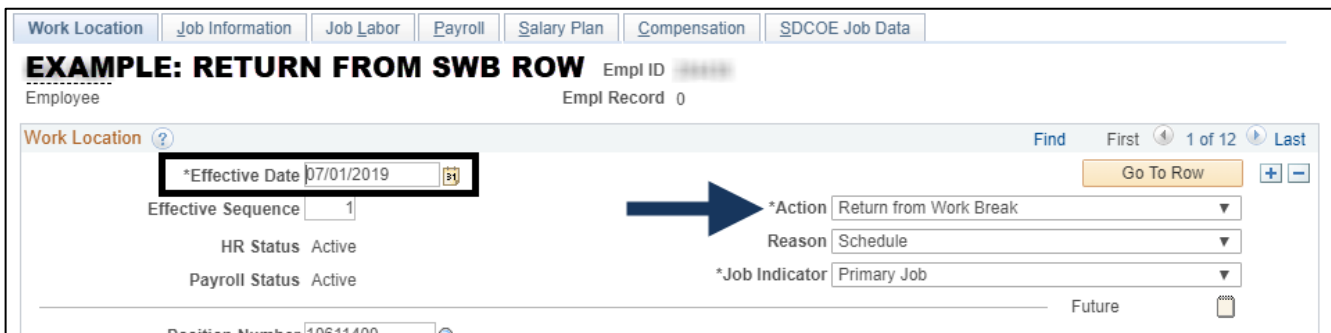
*Job Indicator: Primary Job

Future

Return From SWB

The *Return* from SWB row will be entered during the Paysheet Creation Process on the month that pay is to resume for the employee.

NOTE: The Effective Date of the Return from SWB will be the same as the SWB Effective Date (with a greater Effective Sequence) for each employee.



EXAMPLE: RETURN FROM SWB ROW

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Work Location: [Redacted] Find: First 1 of 12 Last

*Effective Date: 07/01/2019

Effective Sequence: 1

HR Status: Active

Payroll Status: Active

*Action: Return from Work Break

Reason: Schedule

*Job Indicator: Primary Job

Future

IMPORTANT: It is recommended that you make changes to Job Data prior to the SWB row being entered.

Part III: Auditing Data of 10 and 11 Month Employees

Auditing Data Prior to SWB

The following data should be audited prior to the Paysheet Creation Process run during the summer months:

Audit Job Pay Flags on Job Data records by running the following query:

Query: M_PY_JOB_INFO_V1

The query has a lot of information on it. It is recommended that you filter for active 10 and 11 month employees. There are columns for each Job Pay Flag month that is entered on the Job Data record of the employee.

- (Y) indicates that the Pay Flag is CHECKED
- (N) indicates that the Pay Flag is UNCHECKED

1000	20191201	A	20191201	Occupational Therapist	A	Part-Time 11 months	S	40.00	0.81	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	NAANNL	
1000	20191201	A	20191201	Lead Outdoor Ed Spclst	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Spec Ed Clsrm Beh Interv Aide	A	Part-Time 11 months	S	37.50	0.79	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Spec Ed Clsrm Beh Interv Aide	A	Part-Time 11 months	S	37.50	0.79	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Interpreter I - DHH	A	Part-Time 11 months	S	30.00	0.62	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Occupational Therapist	A	Part-Time 11 months	S	40.00	0.86	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Registered Nurse, OE	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Instructional Aide - DHH	A	Part-Time 11 months	S	30.00	0.62	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Outdoor Ed Specialist	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Outdoor Ed Specialist	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Outdoor Ed Specialist	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Spec Ed Clsrm Beh Interv Aide	A	Part-Time 11 months	S	37.50	0.79	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Outdoor Ed Specialist	A	Part-Time 10 months	S	40.00	0.89	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL
1000	20191201	A	20191201	Cook	A	Part-Time 10 months	S	40.00	0.96	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y	NAANNL

Review and note future dated Job Data entries and plan to audit those records on each of the 3 Payroll Calcs.

Query: M_HR_FUTURE_JOB - Future Dated Job Dt Row

The Paysheet creation process will not insert a SWB row on future effective dates during non-paid months and instead treat the Employee as “Active”. If you plan on making Future Dated changes to 10 or 11 month employees, you will need to review the paychecks of the affected employees after each Payroll CALC.

District (xxx) = 1000

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-2 of 2 Last

	District	ID	Name	Empl Record	Eff Date	Dept ID	Job Code	Position	Action	Reason	Descr
1	1000	1010000	Jeffrey Patterson	0	12/02/2019	390	29500	2600	POS	DPT	Department Change
2	1000	1010000	Jeffrey Patterson	0	09/02/2019	522	23308	5167	POS	DPT	Department Change

Part IV: Working with Data During Summer Months

Entering Time for 10 and 11 Month Employees on SWB

In order for an employee to get paid they must have a Paysheet. During the Summer Months Paysheets are created for all employees EXCEPT 10 and 11 month employees to ensure that no monthly pay is generated. However, there are some circumstances in which your district may need to pay an employee in SWB status. If the employee works in one of the months that they are not scheduled to be paid, there are few things to consider:

- **Did they work in the monthly position that is on Short Work Break (M Pay Group)?**
If yes, refer to Steps for paying an employee working in an M Pay Group position that is on SWB.
- **Did they work in an hourly or daily position in (P Pay Group) that is not on Short Work Break?**
Employees in P Paygroups have Paysheets automatically created for 12 months (July through June). They are unaffected by the SWB.

Steps for paying an employee working in an M Pay Group position that is on SWB

The following actions need to be taken to pay a 10 or 11 month employee while they are on SWB (after SWB row has been entered in Job Data and prior to the Return from SWB row has been entered in Job Data):

If SWB is in June Do the following to pay for **time worked prior to June:**

- Enter time on Timesheet
- Create a Paysheet

If SWB is in June Do the following to pay for **time worked in June:**

- Create a Paysheet
- Enter time directly on the Paysheet

If SWB is in July Do the following to pay for **time worked prior to July:**

- Enter time on Timesheet
- Create a Paysheet

If SWB is in July Do the following to pay for **time worked in July:**

- Create a Paysheet
- Enter time directly on the Paysheet

If SWB is in August Do the following to pay for **time worked prior to August:**

- Enter time on a Timesheet
- Create a Paysheet

If SWB is in August Do the following to pay for **time worked in August:**

- Create a Paysheet
- Enter time directly on the Paysheet

Changes to Job Data during Short Work Break

IMPORTANT

For 10 or 11 month employees it is highly recommended that any changes to **JOB DATA** or **POSITIONS WITH ACTIVE INCUMBENTS** which feed into Job Data are done prior to Paysheets being created or AFTER the Return from Short Work Break row is entered by the system.

Making changes to 10 and 11 month employees while on SWB may result in the employee getting paid on a non-paid month.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | SDCOE Job Data

MAKE CHANGES PRIOR TO SWB ROW BEING INSERTED ON JOB DATA RECORD

Empl ID: [REDACTED] Empl Record: 0

Work Location: [REDACTED] Find First 1 of 11 Last

*Effective Date: 07/01/2019 [B]

Effective Sequence: 0

HR Status: Active

Payroll Status: Short Work Break

Action: Short Work Break

Reason: Schedule

*Job Indicator: Primary Job

Go To Row [+] [-]

↑ OR ↓

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | SDCOE Job Data

MAKE CHANGES AFTER RETURN FROM SWB ROW IS INSERTED ON JOB DATA RECORD AND PAY STATUS IS AGAIN ACTIVE

Empl ID: [REDACTED] Empl Record: 1

Work Location: [REDACTED] Find First 1 of 12 Last

*Effective Date: 07/01/2019 [B]

Effective Sequence: 1

HR Status: Active

Payroll Status: Active

Action: Return from Work Break

Reason: Schedule

*Job Indicator: Primary Job

Go To Row [+] [-]

Examples of data changes that should be avoided during SWB are:

- Manual Entered Step Advances
- FTE Changes
- Standard Hours Changes
- Department Changes
- PAY Schedule/Pay Rate Changes
- LOAs and Return from LOAs

If a change is necessary on a Position or Job Data of 10 or 11 month employee while they are on SWB please refer to the following scenarios for steps on how to make the change and what added steps are necessary to ensure that the employee's pay processes as expected.

Examples of Common Job Data Actions During SWB

Example 1: It's July 25, and a 10 month employee turned in his resignation effective 8/5/17 during month that is normally a non paid month. HR inserts a row on JOB Data effective 8/5/19 with Action: Termination. The system will create a paysheet in August and pay the employee from 8/1 through 8/4/19.

SOLUTION: You may have to turn off the "OK to Pay" and remove the "JOB DATA" flag. Or if employee is entitled to pay leave as is, or make an adjustment on Paysheet using REG Earning Code.

Example 2: It's June 29 and District wants to get a head start on entering a new 10 month pay employee for next school year and has an effective hire date of 8/15/19. In August, a paysheet will be created and pay will be prorated from 8/15/19 -8/31/19.

SOLUTION: You may have to turn off the "OK to Pay" and remove the "JOB DATA" flag. Or if employee is entitled to pay leave as is, or make an adjustment on Paysheet using REG Earning Code.

Example 3: An employee is on 10 or 11 pay and will be going to 11 or 12 pay in a month where the Short Work Break row exists on JOB DATA.

SOLUTION: You must return them from the SWB or a Paysheet will not be created.

To make this Employee active in that month you must:

1. Insert a row to return the employee from SWB break before you make any changes on the Position or JOB DATA.
2. Follow HR Job Guide on steps for Position/Job changes
3. At CALC a Paysheet will be created and you can adjust the pay if needed.
4. Always review the paycheck after Payroll CALC.

Example 4: You need to make a change to an employee that is on SWB. The SWB row in Job Data has an Effective Date of 07/01/2019 and the change you need to make is Effective 07/15/2019. You are contemplating making the change with an Effective Date of 07/01/2019 to avoid issues with the SWB process. Do you do it?

NO! Any row inserted in Job Data After the SWB row and prior to the Return from SWB may return the employee back to Active Payroll Status. Also, because the system is completely integrated, it is important that true Effective Dates are always used. In the example above, using an Effective Date of 07/01/2019 may seem harmless if no pay gets generated but it could negatively affect Retirement, Benefits, or other components of HCM.

Future Dating Job Data Actions

CAUTION: FUTURE EFFECTIVE DATES IN JOB DATA DURING MONTHS NOT SCHEDULED FOR PAY CAN CREATE PAY.

The Paysheet creation process will not insert a SWB row on future effective dates during non-paid months and instead treat the Employee as “Active”. If you plan on making Future Dated changes to 10 or 11 month employees, you will need to review the paychecks of the affected employees after each Payroll CALC and do the following:

1. Turn off “OK to Pay”
2. uncheck “JOB PAY” if necessary or make an adjustment to the pay earnings.

Retro Payments during Non Schedule Paid Months (SWB)

If you are paying a RETRO during a month when the employee is not scheduled to work, create a Paysheet and pay RETRO directly on the Paysheet.

RETRO payments made through EXCEL/CI will create a Paysheet for employees on Short Work Break.

Terminations or Retirements During Short Work Break

There are 2 common scenarios for 10 or 11 month employees terminating during summer months.

Scenario 1: An employee is placed on SWB when Paysheets are created for July (Effective Date of SWB row is 07/01/19). You later learn that the employee is resigning or retiring and not returning after July. Since the SWB row has been inserted, you will need to do the following in order to avoid generating pay and to properly terminate the employee.

1. Return them from SWB on JOB DATA
2. Enter the correct termination date.

NOTE: If the term date is after the 1st, pay will be prorated

Scenario 2: An employee is placed on SWB when Paysheets are created for July (Effective Date of SWB row is 07/01/19). You later learn that the employee’s **Effective Date of termination is PRIOR TO THE SWB ROW**. Since the SWB row has been inserted, you will need to do the following in order to avoid generating pay and to properly terminate the employee with the correct Effective Date.

1. Submit an incident requesting that the SWB row be removed in order for you to enter the historical termination.
2. Enter the Termination.
3. If necessary, create a Paysheet to pay any money owed.

Delayed Net Pay (DNP)

DNP (Delayed Net Pay) is a separate payroll payment to employees. It will continue to be Direct Deposit (if already set up) but will be separate from any other pay received (such as timesheets, Vacation payoffs, Retro etc.)

IMPORTANT: The DNP Paysheets are visually available. **Please make sure that data is not entered or updated on the DNP Paysheets.** This will ensure a proper release and the accuracy of the DNP.

Payline	One-Time Deductions	One-Time Garnishments	One-Time Taxes	RTR One-Time Deductions
Company	Pay Group	Pay Period End Date	Page	
Empl ID			Line	
Empl Record 0	Benefit Record	<input type="checkbox"/> Manual Check		
Check Number	Check Date	Total Gross	Net Pay	
Transaction Message Pay Data Change				
Payline Details				Find View All
				First 2 of 2 Last
Add Line Nbr 1	<input checked="" type="checkbox"/> OK to Pay	<input checked="" type="checkbox"/> Override Hourly Rate	<input type="checkbox"/> No Direct Deposit	
Separate Check 1	<input type="checkbox"/> Gross-Up	Reason Deferred Net Pay Refund	<input type="checkbox"/> TL Records	
Reg Hours	OT Hours	Hourly Rate	Reg Salary	
Reg Rate Code	OT Rate Code			
*Shift Not Applicable	*State CA	Locality		
Earnings Begin	Earnings End	Additional Data		

Additional Pay Reminders

- All Additional Pays need to be evaluated when terminating 10 and 11 month employees.
- To stop an additional pay, it is highly recommended that you enter the last day of the effective month for the End Date.

Example: To stop an additional pay from paying in July 2019, set the End Date to 6/30/2019.

Create Additional Pay

Employee [REDACTED] Empl ID [REDACTED] Empl Record 0

Additional Pay Find | View All First 2 of 2 Last

*Earnings Code Extended Day STRS

Effective Date Find | View All First 1 of 2 Last

*Effective Date

Payment Details Find | View All First 1 of 1 Last

*Addl Seq Nbr **End Date**

Rate Code Reason

Earnings Hourly Rate

Hours Goal Balance

Goal Amount

Sep Check Nbr Disable Direct Deposit

OK to Pay Percent of Base Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

▶ Job Information

▶ Tax Information

Override Additional Pay Reminders

Additional Pay Overrides are only evaluated during the Paysheet Creation Process. If you have made any additions or changes on the Additional Pay and Additional Pay Override pages after the Paysheet Creation Process, please audit the Paylines to ensure you have the expected outcome.

Query to audit Addl Pay Overrides: M_PY_ADDL_PAY_OVERRIDE

Override Additional Pay (Employee)

Empl ID Empl Record 0

Additional Pay Find | View All First 1 of 1 Last

*Earnings Code Extended Day STRS

Details Find | View All First 1 of 1 Last

Effective Date Addl Seq # 0

Additional Pay Period

<input checked="" type="checkbox"/> January	<input checked="" type="checkbox"/> April	<input type="checkbox"/> July	<input checked="" type="checkbox"/> October
<input checked="" type="checkbox"/> February	<input checked="" type="checkbox"/> May	<input type="checkbox"/> August	<input checked="" type="checkbox"/> November
<input checked="" type="checkbox"/> March	<input checked="" type="checkbox"/> June	<input checked="" type="checkbox"/> September	<input checked="" type="checkbox"/> December
Select All	Deselect All		

Save
 Return to Search
 Notify

Queries

Helpful Queries for HR/Payroll Data

M_PY_JOB_INFO_V1: List of EE's, Positions, FTE, Salaries and the Active Pay Months.

M_PY_MCOP_VALIDATION: List of EE's, MCOP rate codes, Annual amounts, Monthly amounts and Active Pay months.

M_HR_NAANL_STEP_ENTRY_DT: For Annual Salaried EE's. Lists step for date range selected for Salaried EE's.

M_HR_NAHRLY_STEP_ENTRY_DT: For Hourly EE's (if applicable). Lists step for date range selected for Hourly EE's.

M_PY_AUDIT_JOB_PAYLINE: Lists Employees (in the M Paygroup) Compensation Rate on Jobs and their Compensation on the Paysheet. Look for differences. In most cases the difference is due to proration (late hire, termination, mid-month FTE change, etc.)

M_HR_EE_ACTIONS: Shows the Employee Actions on Job Data within date range.

M_PY_ADDL_PAY_OVERRIDE: List of EE's, Additional Pay Codes, Monthly amounts or %, and Active Pay months.

M_PY_ADDL_PAY_NO_OVRRD: List of EE's, Additional Pays with Overrides missing. The Query returns all Addition Pays without a corresponding override set up.

M_PY_PAYSHEET_SEARCH: Will list all paysheets for the payroll month.

M_PY_CALC_ERROR_MSGS_BY_DIST: Run after the 1st and 2nd calcs to determine if there is an issue with an employee's paycheck, e.g. earnings, benefits, deductions, etc.

Helpful Queries for Benefits and General Deductions

M_BN_EMPL_DED_PROC_GENDED: Benefit and Non-Benefit General Deduction Codes, Monthly Amounts and Active Deduction Months (only for active employees).

M_BN_EMPL_DED_PROC_HLTH: Health Plan Deductions (Medical/Dental/Vision) and Active Deduction Months (only for active employees).

M_BN_EMPL_DED_PROC_NONHLTH: Non-Health Plan Deductions (Disability, Life, Long Term and Legal Plans) and Active Deduction months (only for active employees).

M_BN_EMPL_DED_PROC_SVNGS: 403B/457/Roth Savings plan deductions and Active Deduction Months (only for active employees).

M_BEN_DED_OVERRD_MISSING: Benefit and general deduction enrollments that do not have a corresponding override. NOTE: It's possible that certain benefits and general deductions listed in the results may not require an override, such as OPEB or Workers' Comp. Includes both active and inactive employees – check HR Status column.

Helpful Queries for Time & Labor and DNP (Delayed Net Pay)

M_TL_PAYABLE_TIME_TERM_SWB: List of timesheet entries with a status of Estimated, Rejected or Taken for Employees who are terminated or on SWB status on JOB DATA.

M_TL_PAYABLE_TIME_AUDIT: Lists all reported time which has been approved, picked up by Time Administration and moved over to payable time.

M_TL_EXCEPTIONS: List of all timesheet exceptions.

NOTE: High Severity exceptions will not be paid (Ex. Reporting an Override Rate for an Amount TRC, or an Invalid Combo code)

M_TL_SCHED_VALIDATION: Lists work schedule assigned to corresponding employee position.

M_PY_DNP_BALANCE_DISTRICT: List of employee's DNP balance Section Title