

Summer Months and Short Work Break

Presented by SDCOE CRC and PIT | June 4, 2019

Agenda

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- Summer Months
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 - Wrap-up / Q&A

Short Work Break (SWB)

EMPLOYEES AFFECTED

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

Short Work Break (SWB) Explained

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.**

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

JULY 2019

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

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	5 Issue OFF Warrants M07 Paysheets Available EX HRLY LOAD* TL - APRV,LOAD AM - APRV	

Short Work Break (SWB) Explained Cont.

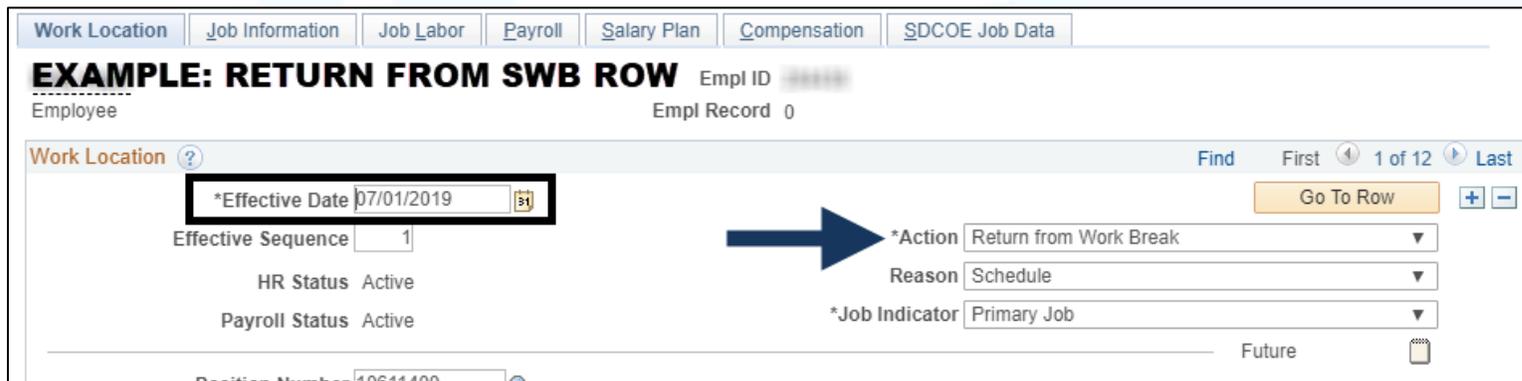
A 10 or 11 month employee set up involves selecting the specific month(s) that the employee is not to be paid. This is done by unchecking the boxes of the months in Job Data (Job Data > SDCOE Job Data tab) for the months that the employee should not receive a paycheck. Unchecking the box is not solely 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.

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.

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



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

EXAMPLE: RETURN FROM SWB ROW Empl ID [REDACTED]
Employee Empl Record 0

Work Location ? Find First 1 of 12 Last
*Effective Date 07/01/2019 [B] Go To Row + -

Effective Sequence 1
HR Status Active
Payroll Status Active

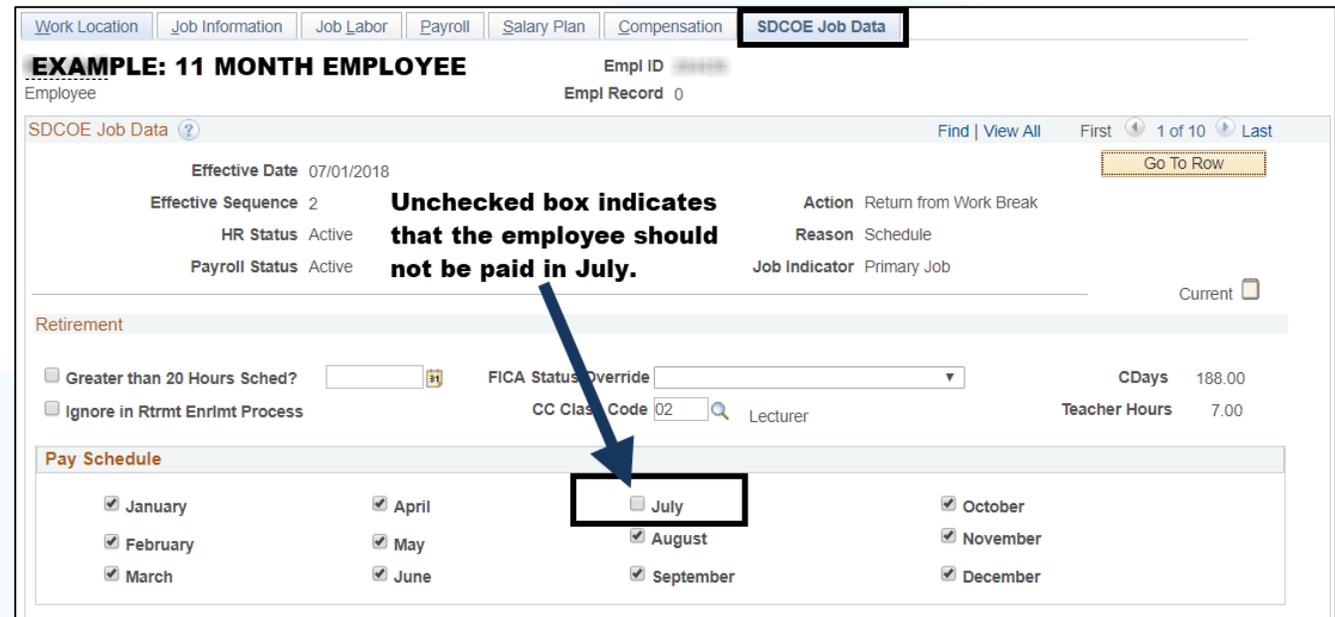
*Action Return from Work Break
Reason Schedule
*Job Indicator Primary Job
Future

Summer Months

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.

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.

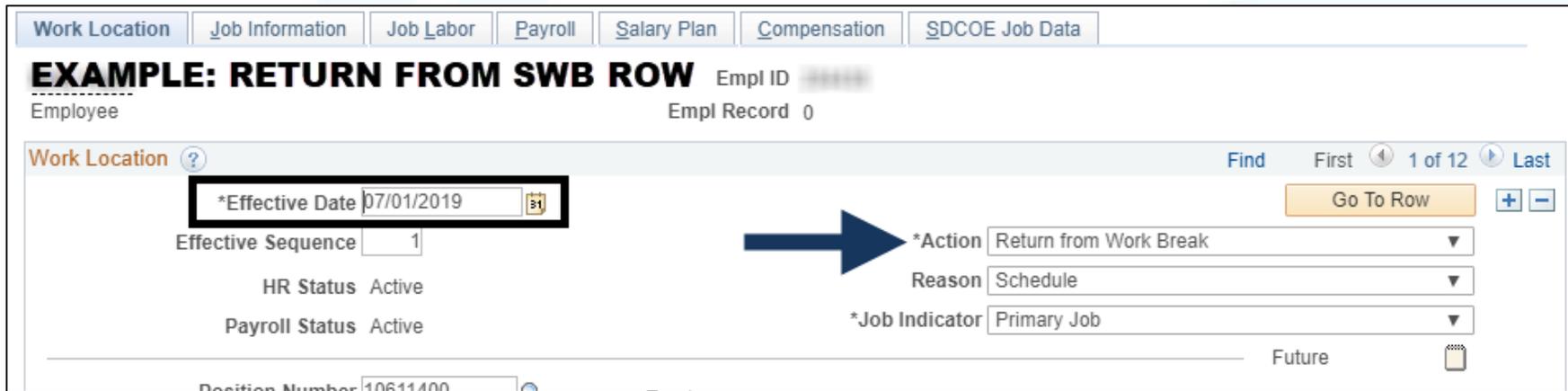


The screenshot displays the 'SDCOE Job Data' interface for an 'EXAMPLE: 11 MONTH EMPLOYEE'. The 'Pay Schedule' section at the bottom shows a grid of months with checkboxes. The 'July' checkbox is unchecked, while all other months (January through December) are checked. A blue arrow points from the text 'Unchecked box indicates that the employee should not be paid in July.' to the unchecked July checkbox. The 'Effective Date' is 07/01/2018, and the 'HR Status' is 'Active'. The 'Payroll Status' is also 'Active'. The 'Job Indicator' is 'Primary Job'. The 'Retirement' section includes options for 'Greater than 20 Hours Sched?' and 'Ignore in Rtrmt Enrlmt Process'. The 'FICA Status Override' is set to 'Lecturer'. The 'CC Class Code' is '02'. The 'CDays' are 188.00 and 'Teacher Hours' are 7.00. The 'Action' is 'Return from Work Break' and the 'Reason' is 'Schedule'.

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.



The screenshot displays the 'SDCOE Job Data' tab in the EBS system. The main heading is 'EXAMPLE: RETURN FROM SWB ROW' with 'Empl ID' and 'Empl Record 0' displayed. The 'Work Location' section includes a search bar and navigation controls. The '*Effective Date' field is set to '07/01/2019' and is highlighted with a black box. A blue arrow points from this field to the '*Action' dropdown menu, which is set to 'Return from Work Break'. Other fields include 'Effective Sequence' (1), 'HR Status' (Active), 'Payroll Status' (Active), 'Reason' (Schedule), and '*Job Indicator' (Primary Job). The 'Position Number' is '10611400' and the 'Future' status is indicated.

Auditing Data of 10 and 11 Month Employees

Review Future Dated Job Data Entries

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) = 000

[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	000	000000	Jeffrey P. Johnson	0	12/02/2019	390	29500	02600	POS	DPT	Department Change
2	000	000000	Jeffrey P. Johnson	0	09/02/2019	522	23308	05167	POS	DPT	Department Change

Working with Data During Summer Months

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 Empl ID [REDACTED]
BEING INSERTED ON JOB DATA RECORD Empl Record 0

Work Location [REDACTED] Find First 1 of 11 Last

*Effective Date 07/01/2019 [Calendar Icon]

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 Empl ID [REDACTED]
DATA RECORD AND PAY STATUS IS AGAIN ACTIVE Empl Record 0

Work Location [REDACTED] Find First 1 of 12 Last

*Effective Date 07/01/2019 [Calendar Icon]

Effective Sequence 1

HR Status Active

Payroll Status Active

*Action Return from Work Break

Reason Schedule

*Job Indicator Primary Job

Go To Row [+] [-]



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

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

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 SWB

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

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 SWB

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

Terminations or Retirements During SWB

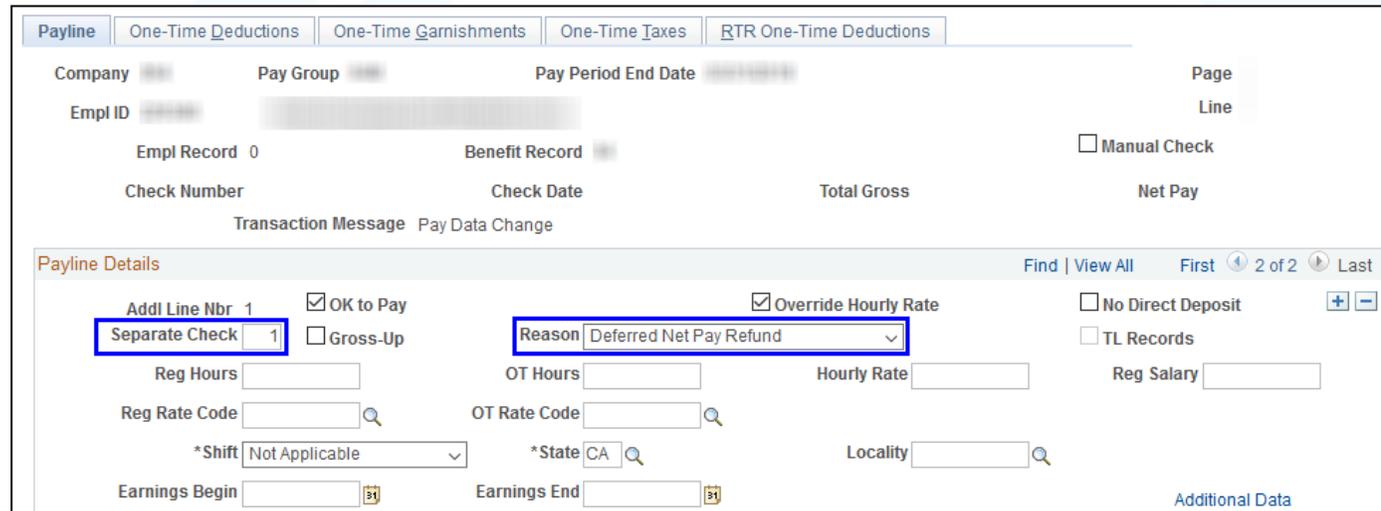
Scenario 2: An employee is placed on SWB when Paysheets are created for July (Effective Date of SWB row is 07/01/19). You later learn that the employee's **Effective Date of termination is PRIOR TO THE SWB ROW**. Since the SWB row has been inserted, you will need to do the following in order to avoid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

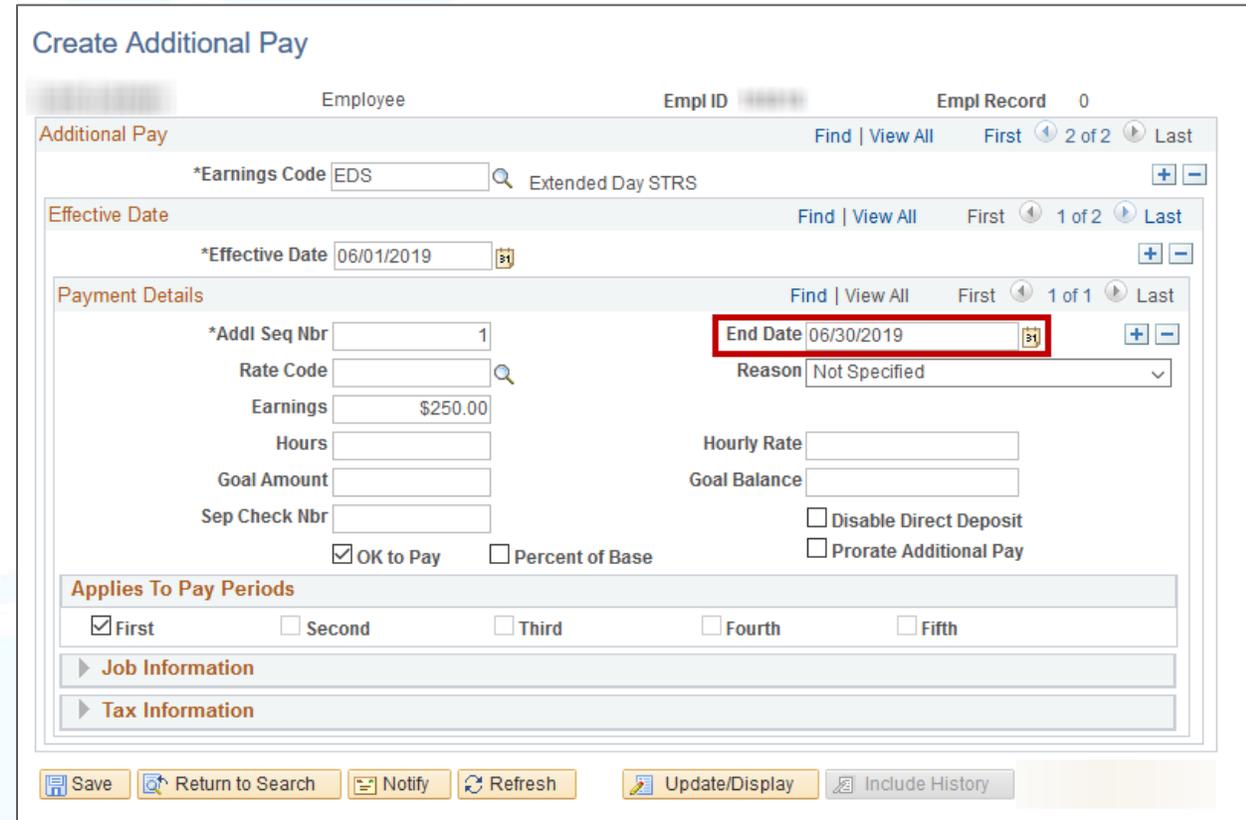


The screenshot shows the 'Payline Details' section of the EBS payroll system. The 'Reason' dropdown menu is set to 'Deferred Net Pay Refund'. The 'Separate Check' checkbox is checked, and the 'Add Line Nbr' is set to 1. The 'Override Hourly Rate' checkbox is also checked. Other fields include 'Reg Hours', 'OT Hours', 'Hourly Rate', 'Reg Salary', 'Reg Rate Code', 'OT Rate Code', '*Shift' (set to 'Not Applicable'), '*State' (set to 'CA'), and 'Locality'. The 'Earnings Begin' and 'Earnings End' fields are also visible.

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.



The screenshot displays the 'Create Additional Pay' form. Key fields include:

- Earnings Code:** EDS (Extended Day STRS)
- Effective Date:** 06/01/2019
- Payment Details:**
 - *Addl Seq Nbr:** 1
 - Rate Code:** (empty)
 - Earnings:** \$250.00
 - Hours:** (empty)
 - Goal Amount:** (empty)
 - Sep Check Nbr:** (empty)
 - Hourly Rate:** (empty)
 - Goal Balance:** (empty)
 - Reason:** Not Specified
 - End Date:** 06/30/2019 (highlighted in red)
 - Disable Direct Deposit
 - Prorate Additional Pay
 - OK to Pay
 - Percent of Base
- Applies To Pay Periods:**
 - First
 - Second
 - Third
 - Fourth
 - Fifth
- Job Information:** (collapsible section)
- Tax Information:** (collapsible section)

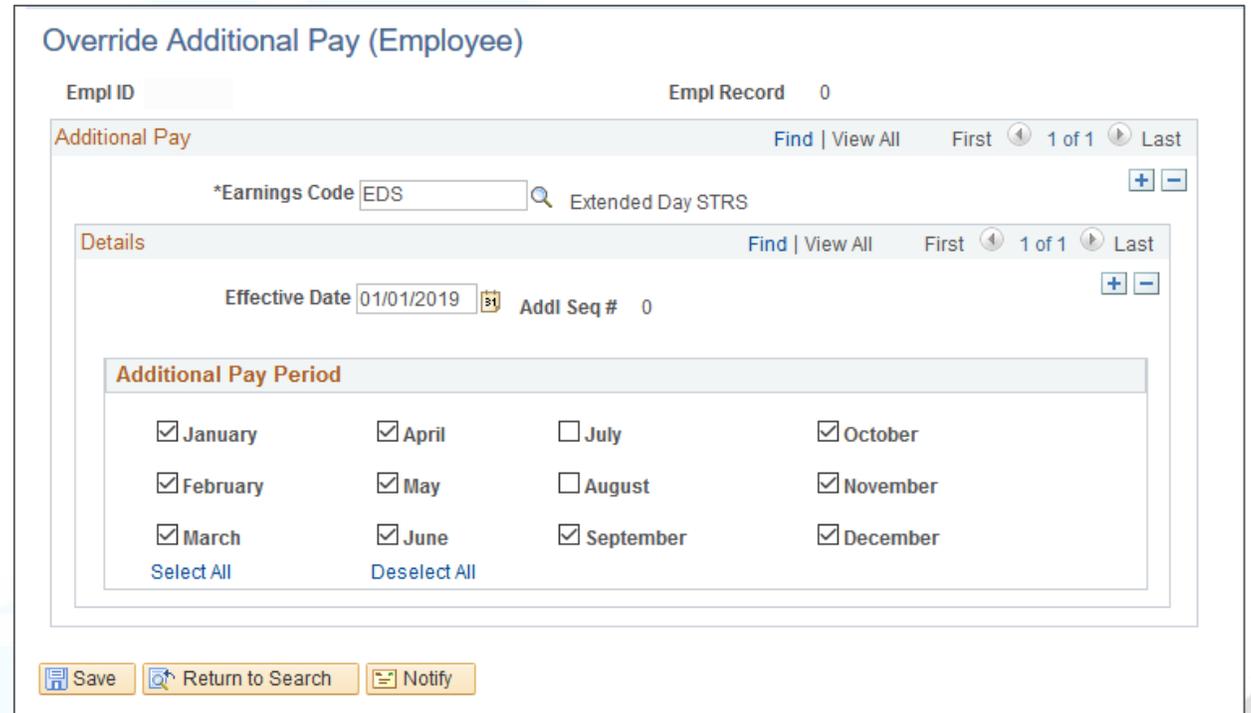
Buttons at the bottom: Save, Return to Search, Notify, Refresh, Update/Display, Include History.

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