

# Update New Year Pay Rates

ERP-Statewide

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## Table of Contents

1 Step-by-step guide.....	4
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The process on this page is used to prepare various payroll reference tables for the new fiscal year and to update employee pay rates for new contract years.

# 1 Step-by-step guide

## ⚠ Calendars and Salary Schedules

Prior to updating new year pay rates using the process detailed below, ensure the new year calendars have been entered into eFP and the new year salary schedules have been entered and posted into eFP. Details on these steps are located on the [Payroll Fiscal Year End Setup](#)<sup>1</sup> page.

## ✔ Employee Pay Rate Update Process

Repeat the below steps for each group of employees after paying their last pay of the old contract and before loading timecards for the first pay of the new contract.

1. In the job class reference table, update job classes with the new calendar and salary schedule (if applicable). Don't update the job classes until you are ready to move employees in the respective job classes to their new year pay rate. Otherwise, any new employees added with an updated job class will have pay rates built with the new year job class information.

## ⚠ Update Job Classes

The process to update job classes should only be done for the job classes which are involved in the pay rate updates which will be performed.

2. Find all employees who have a pay rate set as Override. If necessary, change them back to System Calculate before proceeding with updating employee pay rates. Verify their range and step is correct (for the old contract year) prior to performing the update rates and auto step processes for the new contract.
  - a. Perform this search in Employee Pay Rates (HR>Entry & Processing>Employee Pay Rates).
  - b. The advanced search criteria for this search is shown below.

Advanced Search Criteria			
Employee Pay Rate Information	Override flag	Equals	End

3. Use the payroll history (HR>Periodic Routines>Periodic Processing>Payroll History) feature of eFP to save a snapshot of payroll prior to updating employee pay rates.
  - a. Click the Save icon in the top action bar.

<sup>1</sup> <https://community.mcoecn.org/display/ERPPublic/Payroll+Fiscal+Year+End+Setup>

- b. Use the current date for the capture date and check the All Records check box.

**Save Criteria**

Capture Date \* 06/06/2018 x [calendar icon]

All Records

Pay Rate Records

Payroll Records

Deduction Records

Termination Date [text box] [calendar icon]

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**Additional Criteria**

Employee Number [text box] [magnifying glass icon]

- c. Click the green OK icon twice to create the payroll history.
- d. Verify the information has been saved and click OK.
4. If you will be updating a significant number of pay rates and would like a full backup of your eFP database, submit a help desk ticket to your ITC requesting a payroll backup prior to continuing with the pay rate update processes.



**⚠ Do NOT Proceed Without a Database Backup Confirmation**  
If you requested a database backup, do NOT proceed until you receive confirmation the database backup has been completed by your ITC.

5. Ensure no one else is accessing any payroll related areas of eFP.
6. Use the search function in employee pay rates (HR>Entry & Processing>Employee Pay Rates) to determine the selection criteria to use in the following two steps when updating pay rates and performing the auto-step process.



**⚠ Determine Pay Rates to Update**  
It is **imperative** to use Employee Pay Rates to search and review pay rates, prior to performing the following two steps to update pay rates and perform the auto-step process. Using the search function of Employee Pay Rates will allow you to determine the exact search criteria to use for when updating the pay rates.

7. Update new year rates (HR>Periodic Routines>Update New Year Rates). This process is used for all employees.
- Use the various selection criteria fields (in the red box in the below image) to specify which pay rates to update.
  - Check the Reset Dates check box (this will associate the job class calendar to the employee pay rates and update the associated dates on the employee pay rate).
  - Check the Reset Paid to Zero and Update Contract Limit/Balance check box (this will zero the paid amount and update the annual salary and contract amounts for employees on a salary schedule).

- d. Terminated pay rates will not be updated.

Selection Criteria	
Class	<input type="text"/>
Schedule	<input type="text"/>
Start Date	<input type="text"/> 
Pay Group	<input type="text"/>
Employee Number	<input type="text"/> 
Inactive Rates	<input type="checkbox"/>
Reset Dates	<input checked="" type="checkbox"/>
Reset Paid to Zero and Update Contract Limit/Balance	<input checked="" type="checkbox"/>
Retain Paid and Update Contract Limit/Balance	<input type="checkbox"/>

8. For employee groups on a salary schedule, run the Auto Step process (HR>Entry & Processing>Salary Negotiations>Auto-Step Employees).
- Use the various selection criteria fields (in the red box in the below image) to specify which pay rates to update.
  - Check the Reset Balances check box (this will update the annual salary and contract amounts to the new step amount).

Auto-step Criteria	
Schedule	<input type="text"/>
Class	<input type="text"/>
Start Date	<input type="text"/> 
Inactive Rates	<input type="checkbox"/>
Reset Dates	<input type="checkbox"/>
Reset Balances	<input checked="" type="checkbox"/>
	

- For employees who are not on a salary schedule, the Update New Year Rates process will clear out the contract paid amount and update the calendar and associated dates. However, the annual salary and contract limit will need to manually modified on the appropriate pay rates.
- Any changes to the salary range (column) will need to be manually updated on the employee pay rate screen.
- Find all employees who were on a separate zero step salary schedule and update their pay rate to put them on the appropriate salary schedule, range and step.
- Find all employees who had a mid year contract change. If necessary, change their pay rate to have the appropriate salary schedule, calendar and pay method. Verify their range, step and contract amounts are correct (for the new contract year).

13. Update any budget units that need changed on an employee pay rate screen. An example would be a salary paid out of a federal grant with a new year grant fund.

## Related articles

### Content by label

There is no content with the specified labels

