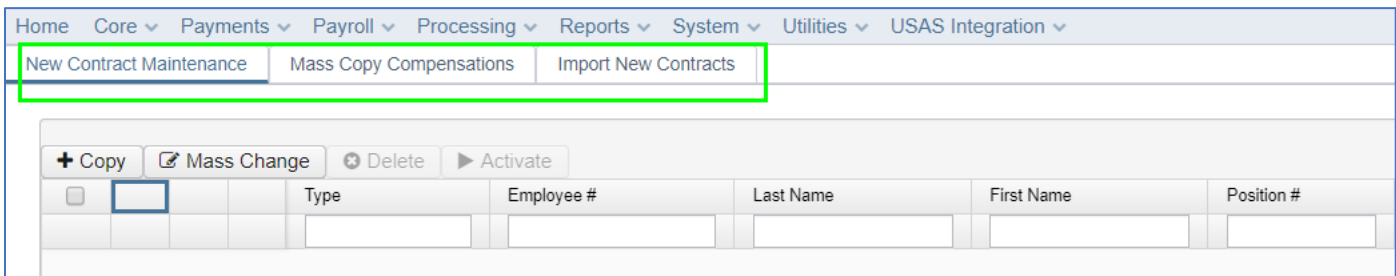




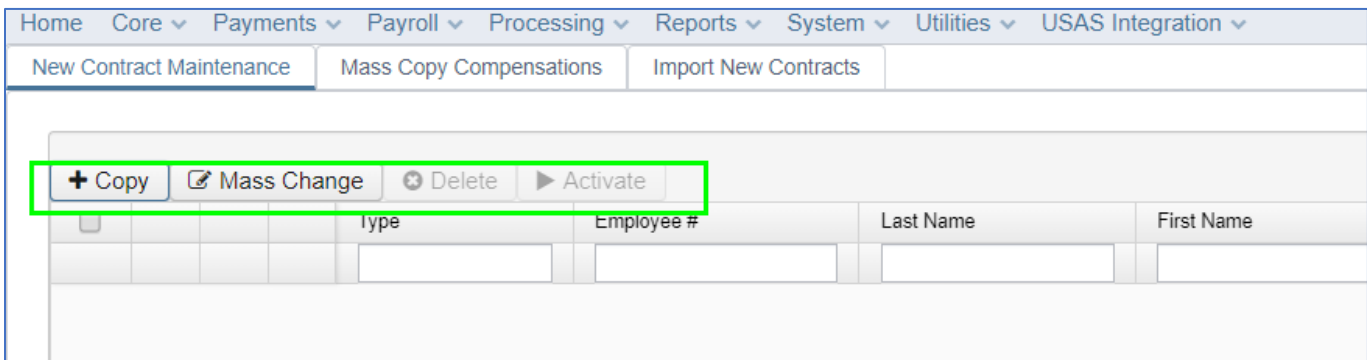
# Setting up New Contracts in Redesign

Go to **Processing > New Contracts**.

3 processes: **New Contract Maintenance**, **Mass Copy Compensations** and **Import New Contracts**.



4 functions: **Copy**, **Mass Change**, **Delete** and **Activate**. Copy, Delete and Activate are functions used in New Contract Maintenance.



## MASS COPY COMPENSATIONS

Use to build contracts by pay group and job status. New contracts built will use 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

Click Mass Copy Compensations.

Select **Job Status**. You may choose to include Active and/or Inactive and Archived employees.

Enter a date for including **compensations “active as of.”** Compensations will be included where the Start Date is either blank, or is before or equal to the date entered, AND the Stop Date is either blank, or after or equal to the date entered.

Select **Pay Group(s)**.

Enter **Contract Start Date** (usually the 1<sup>st</sup> day for which the job will be paid, the 1<sup>st</sup> day worked) and **Contract Stop Date**. These are both *required* fields.

**NOTE:** New Hire date used for reporting to Ohio Dept of Human Services will be set to the Contract Start Date.

Home Core Payments Payroll Processing Reports System Utilities USAS Integration

New Contract Maintenance Mass Copy Compensations Import New Contracts

Select existing compensations to mass copy to new contracts

Job Status  
Active

Include archived employees?

Include compensations active as of:  
5/25/20

Select Pay Groups:

Available

- None (\$\$)
- Administration (00)
- July 1 Classified Staff (02)
- August 1 Classified Staff (03)
- September 1 Classified Staff (04)
- Tutors (05)
- Substitute Teaching Staff (06)
- Substitute Classified Staff (07)
- Certified Supplementals (08)
- Board Members (09)
- Classified Supplementals (10)
- Extended Service (11)

Selected

- Teachers (01)

Contract start date  
8/21/20

Contract stop date  
8/20/21

(115 compensations currently selected for build)

Build New Contracts

The number of compensations will display above the Build New Contracts button.

Compensations meeting the criteria will be displayed in the Selected Compensations grid below the options area. The grid will update if the “active as of” date is changed, another Pay Group is added, etc.

Selected Compensations								
Employee Number	Last Name	First Name	Job Status	Position Number	Position Description	Pay Group	Start Date	Stop Date
BE1001451			Active	1	Guidance Secretary	July 1 Classified Staff (02)	07/01/2019	
FO1001179			Active	1	High School Secretary	July 1 Classified Staff (02)	07/01/2019	
SA1001128			Active	1	BUILDING ENGINEER	July 1 Classified Staff (02)	07/01/2019	
FE1001145			Active	1	Payroll & Benefit Specialist	July 1 Classified Staff (02)	07/01/2019	

Click on **Build New Contracts**.

When complete, the following message will display.

Messages

✓ Info - 115 Compensations were copied into New Contract records.

The newly built contracts will then be listed in the New Contracts Maintenance grid.

	Type	Employee #	Last Name	First Name	Position #	Position Description	Compensation Description	Compensation Label	Type
<input type="checkbox"/>	New contract	NA1001111			1	Teacher		Teacher	184
<input type="checkbox"/>	New contract	SL1001111			1	Psychologist		Psychol	184
<input type="checkbox"/>	New contract	LE1001111			1	Regular Classroom Teacher		Teacher	184
<input type="checkbox"/>	New contract	GI1001162			1	Regular Classroom Teacher		Teacher	184
<input type="checkbox"/>	New contract	BO1001179			1	Regular Classroom Teacher		Teacher	184
<input type="checkbox"/>	New contract	PO1001145			1	Teacher		Teacher	184

Review contracts. After clicking the checkbox next to an employee, use the **Delete** option to remove any from the list, OR, click the **X** icon to the left of the data.

Modifications can be made in New Contract until Activated. Run Activate only when you are ready to pay on the New Contract(s) and after running New Contract Reports.

Select all contracts by checking the box at the top of the grid. Then click **Activate**.

<input checked="" type="checkbox"/>	Type	Employee #	Last Name	First Name
<input checked="" type="checkbox"/>	New contract	NA1001111		
<input checked="" type="checkbox"/>	New contract	SL1001111		
<input checked="" type="checkbox"/>	New contract	LE1001111		
<input checked="" type="checkbox"/>	New contract	GI1001162		
<input checked="" type="checkbox"/>	New contract	BO1001179		
<input checked="" type="checkbox"/>	New contract	PO1001145		

Click Activate to confirm action in the pop-up.

Activate New Contracts + x

Are you sure you want to activate 6 new contracts?

All selected contracts will be activated and moved into live compensation records. They will be *removed* from the New Contract Maintenance screen.

When complete, you may see informational messages.

Messages + x

- ✓ Info - Unit Amount has been calculated based upon contract values for Employee: EI1001111, Position: 1.
- ✓ Info - Pay Per Period has been calculated based upon contract values for Employee: EI1001111, Position: 1.

Click the **X** to close the Messages box.

You'll then see another message displaying how many contracts were updated.

Both the Old and New Contracts for the employees will display under Core > Compensation > Contract Compensations.

	Number	Last Name	First Name	Pos #	Position Description	Type	Description	Job Status
	AC1001111			1	Teacher	Legacy		Active
	AC1001111			1	Teacher	Contract		Active
	AC1001145			1	Teacher	Legacy		Active
	BE1001434			1	Teacher	Legacy		Active
	BE1001434			1	Teacher	Contract		Active
	BE1001468			1	Teacher	Contract		Active
	BE1001468			1	Teacher	Legacy		Active
	BR1001264			1	Teacher	Contract		Active

## IMPORT NEW CONTRACTS

The upload file must contain heading in row ONE. See template for exact row headers.

**IMPORTANT:** Column headers for the import file are case sensitive.

Fields that are required:

- **employeeId**
- **jobNo**
- **contractType**
- **compensationLabel** - only required if employee has more than one Compensation for a Position.
- **contractAmount** – required only for stretch paid jobs
- **hoursInDay** – required only for contracted hourly jobs

Information not specified in the spreadsheet will be pulled from existing Compensation records.

Choose Import New Contracts.

Choose your upload CSV file.

Enter Contract Start Date.

Click Import.

When import completes, results will be displayed.

Records Loaded: 6

Errors: 0

Total Records: 6

The newly imported contracts will then be listed in the New Contracts Maintenance grid.

New Contract Maintenance			Mass Copy Compensations	Import New Contracts				
<input type="checkbox"/> Copy <input type="checkbox"/> Mass Change <input type="checkbox"/> Delete <input type="button" value="▶ Activate"/>								
			Type	Employee #	Last Name	First Name	Position #	Position Description
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	QU1001111			1	Secretary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BE1001451			1	Guidance Secretary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	FO1001179			1	High School Secretary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BL1001145			1	Superintendent Secretary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	MA1001332			1	Central Elem. Secretary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BO1001298			1	Hilltop Secretary

When ready to begin paying these contracts, and *after* running & SAVING New Contract reports, select contracts and Activate to post to live.

+ Copy			<input type="checkbox"/> Mass Change	<input type="checkbox"/> Delete	<input type="button" value="▶ Activate"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type	Employee #	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	QU1001111	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BE1001451	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	FO1001179	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BL1001145	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	MA1001332	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New contract	BO1001298	

Both the Old and New Contracts will show under Core > Compensation > Contract Compensations.

All Compensations			Contract Compensations	Non Contract Compensations		
<input type="button" value="+ Create"/> <input type="checkbox"/> Mass Change				<input type="checkbox"/> Include Archived		
	Number	Last Name	First Name	Pos #	Position Description	Type
<input type="checkbox"/>	BE1001451			1	Guidance Secretary	Legacy
<input type="checkbox"/>	BE1001451			1	Guidance Secretary	Contract
<input type="checkbox"/>	BL1001145			1	Superintendent Secretary	Legacy
<input type="checkbox"/>	BL1001145			1	Superintendent Secretary	Contract
<input type="checkbox"/>	BO1001298			1	Hilltop Secretary	Legacy
<input type="checkbox"/>	BO1001298			1	Hilltop Secretary	Contract

## NEW CONTRACT MAINTENANCE

### COPY

Use Copy to set up a contract for an individual, either a new contract or a mid-year change. Click Copy. In the pop-up, find employee and position (only contracts, not non-contract positions, will be available to select) from the dropdowns.

Select 1 of 4 Contract Types:

- 1 Mid-contract w/no retro
- 2 Mid-contract w/retro spread over remaining pays
- 3 Mid-contract with lump sum retro
- 4 New Contract

The screenshot shows a web form titled "Create New Contract from existing Compensation". It contains three dropdown menus: "Employee:" (with a blacked-out selection), "Compensation:" (with "Position: 1, Desc: Teacher (Comp: Contract, Teach" selected), and "Contract Type:" (with "New contract" selected and highlighted in yellow). Below the dropdowns is a "+ Create" button.

Click Create. A new compensation screen will open. Complete additional information for the new contract. Click Save. The contract will add into New Contract Maintenance. This is helpful if you have already used Mass Copy or Import to populate the New Contract Maintenance grid but, for example, missed including an employee. Or, use to create a new individual contract mid-year.

## NEW CONTRACT REPORTS

- 1.) [Reports > New Contract Report](#) - Generates a report outlining purged contracted information.

The screenshot shows the "Reports" dropdown menu in the SSDT USPS application. The menu is open, displaying a list of report options. The "New Contract Report" option is highlighted in yellow. The menu items include: Report Bundles, Report Manager, Custom Report Creator, ACH Submission, AFFORD Report, Auditor of State CSV Report, Benefit Obligation By Account, Benefit Obligation By Employee, CENSUS Report, Check STRS Advance, CRDC Report, EMIS Reports, Employee Earnings Register, Employee Master, Employer Distributions, Employer Retirement Share, Job Calendar Report, Leave Balance Report, Leave Projection Report, New Contract Report, ODJFS New Hire Report, ODJFS Report, Pay Amount Summary Report, and Payment Transaction Status Report.

Choose Sort option. Enter Contract Start Date, select Appointment Type (or leave blank to include all) and select the correct Job Calendar created for the next fiscal year.

New Contract Report Options

Sort By:    
 Include Subtotal by Selected Sort Option?  
 Page Break by Selected Sort Option?

Contract Start Date:   
Appointment Type:

Select Job Calendars: Available  Selected

- 188 - Library, Teacher Aide & Early ID Calenda
- 200 - School Nurse Calendar
- 205 - Secretary Calendar
- 210 - 10 Month Secretary Calendar
- 215 - Elementary/Middle Principal Calendar
- 216 - Elementary and Middle School Prin Calend
- 219 - 219 Secretary Calendar
- 220 - Student Services Director
- 225 - High School Principal Calendar
- 237 - Viel Calendar
- 240 - Blair Calendar
- 250 - 11-12 Month Secretary Calendar
- 252 - 12 Month Administrative Calendar
- 260 - 12 Month Classified Calendar
- DEF - Default Calendar
- EXT - Extended Service - Lunsford
- FAL - Fall Supplemental Calendar
- SNA - St. Nicholas Tutor Calendar
- SPR - Spring Supplemental Calendar
- WIN - Winter Supplemental Calendar

T21 - Teacher FY21 184

All Pay Groups will already be selected. Move unwanted Pay Groups to the Available box.

Select Pay Groups: Available  Selected

- None (\$\$)
- Administration (00)
- July 1 Classified Staff (02)
- August 1 Classified Staff (03)
- September 1 Classified Staff (04)
- Tutors (05)
- Substitute Teaching Staff (06)
- Substitute Classified Staff (07)
- Certified Supplementals (08)
- Board Members (09)

Teachers (01)

Click Generate Report.

Example New Contract Report sorted by Employee Name, with "Include Subtotal..." selected:

6/27/19 12:22 PM

## New Contract Report

<b>Employee:</b> ANON750 Frank Diane Berry		<b>Position:</b> 1 - Teacher			
<b>New Contract Type:</b> New contract	<b>Comp. Description:</b>	<b>Compensation Label:</b> constantly	<b>Contract Type:</b> CC		
<b>Contract Obligation:</b> 66,316.00	<b>Contract Start Date:</b> 8/16/2019	<b>Stretch Pay:</b> true	<b>Raise Date:</b>		
<b>Contract Amount:</b> 66,316.00	<b>Contract Stop Date:</b>	<b>Accrued Wages:</b> 0.00	<b>Retirement Hours:</b> 0.00		
<b>Pay Per Period:</b> 2,763.17	<b>Job Calendar:</b> tzp	<b>Calendar Start Date:</b> 8/11/2003	<b>Supplemental Type:</b> None		
<b>Unit Amount:</b> 364.374	<b>Contract Work Days:</b> 182.00	<b>Calendar Stop Date:</b>	<b>Salary Schedule ID:</b> CERT		
<b>Pays in Contract:</b> 24	<b>Cont. Days Worked:</b> 0.00	<b>Hours in Day:</b> 6.75	<b>Sal. Sched. Column:</b> 4		
<b>Pays Paid:</b> 0	<b>Pay Plan:</b> Semi-monthly	<b>Pay Group:</b> 05	<b>Salary Schedule Step:</b> 18.00		
<b>Retro Next Pay:</b>	<b>Pay Unit:</b> Daily				
<b>TOTAL FOR EMPLOYEE</b>					
<b>Contract Amount:</b> 66,316.00	<b>Contract Obligation:</b> 66,316.00	<b>Pay Per Period:</b> 2,763.17	<b>Number of Contracts:</b> 1	<b>Daily Contracts:</b> 1	<b>Hourly Contracts:</b> 0

Run and SAVE the following to review New Contracts and for balancing:

- 2.) Reports > Report Manager > **SSDT New Contract Summary Report**
- 3.) Reports > Report Manager > **SSDT New Contract Payroll Accounts Report**
- 4.) **New Contract Maintenance** grid report

Use the following extract report when ready to pay Non Contract positions in the new fiscal year:

- 5.) Reports > Report Manager > **SSDT Non Contract Compensation Mass Load Extract**

Generate this report for supplemental positions, timesheets, board members, coaches, etc. Default format is set to Excel-FieldName. While you cannot enter criteria for this report, you can filter in the resulting Excel file.

After updating the data for the selected employees in your Excel file, save as CSV.

Example Non Contract Compensation Mass Load Extract (for this screenshot, field names have been wrapped and column A (record ID) omitted, data sorted by calendar start date):

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	position. number	position.employee .number	description	label	unitAmount	payPlan	payUnit	InDay	hours Hours	retirement startDate	calendarDate. stopDate	calendarDate. startDate	dateRange. stopDate	dateRange. strsAdvance	supplemental TaxOption
2	8	AC1001111	Summer Sch	Sum Sch 2020	35	Semimonthly	Daily	3		06/15/2020		06/15/2020	07/31/2020		None
3	1	DA1001332		BV Track	3049	Semimonthly	Hourly	2	2	03/01/2020					None
4	3	KO1001247		MS Track	1626	Semimonthly	Hourly	2	2	02/19/2020		02/19/2020		FALSE	None
5	3	PL1001162		Track	1423	Semimonthly	Hourly	2	2	02/19/2020		02/19/2020		FALSE	None
6	8	SH1001145			0	Semimonthly	Daily	2		01/06/2020				FALSE	None
7	1	RA1001247		BOE Memb	125	Semimonthly	Daily	1	1	01/01/2020		01/01/2020		FALSE	None
8	4	PL1001145		Tchr Cov	30	Semimonthly	Hourly	0	0	01/01/2020				FALSE	None

In this screenshot, I filtered on “label” and included start dates only from the current fiscal year:

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	position. number	position.employee .number	descriptio	label	unitAmou	payPlan	payUi	InD	Hours	startDate	stopDate	startDate	stopDate	strsAdvan	TaxOption
8	4	PL1001145		Tchr Cov	30	Semimonthly	Hourly	0	0	01/01/2020				FALSE	None
9	3	CR1001162		Tchr Cov	30	Semimonthly	Hourly	0	0	01/01/2020				FALSE	None
11	3	HA1001298		Tchr Cov	30	Semimonthly	Hourly	0	0	12/01/2019				FALSE	None
12	3	ST1001434		Tchr Cov	30	Semimonthly	Hourly	0	0	11/21/2019				FALSE	None
31	4	SC1001298		Tchr Cov	30	Semimonthly	Hourly	0	0	09/01/2019				FALSE	None
148															

In this example, I changed calendar start & stop dates.

position.number	position.employee.number	description	label	unitAmount	payPlan	payUnit	hoursInDay	retirementHours	calendarDate.startDate	calendarDate.stopDate
4	PL1001145		Tchr Cov	30	Semimonthly	Hourly	0	0	8/21/2020	6/25/2021
3	CR1001162		Tchr Cov	30	Semimonthly	Hourly	0	0	8/21/2020	6/25/2021
3	HA1001298		Tchr Cov	30	Semimonthly	Hourly	0	0	8/21/2020	6/25/2021
3	ST1001434		Tchr Cov	30	Semimonthly	Hourly	0	0	8/21/2020	6/25/2021
4	SC1001298		Tchr Cov	30	Semimonthly	Hourly	0	0	8/21/2020	6/25/2021

When finished making changes, and when ready to begin - paying for the new fiscal year, go to Utilities > Mass Load, browse for and choose your CSV file. Select NonContractCompensation from the Importable Entities dropdown, and click Load.

USPS Load File  NonContract...\_upload.csv

Importable Entities:  ▼



When upload completes, a USPSLOADERR report will be generated. A successful load will result in the following message in the ERR report along with the number of records loaded.

id	position.number	position.employee.number
No errors. Records loaded: 5		

These NonContract Compensations will immediately post into live in Core > Compensations > Non Contract Compensations, overwriting previous compensation information.

**TIP for any upload/import spreadsheet:**

Use the description or label field to include an identifier for the fiscal year to differentiate new contracts an non-contracts from others as they are built over time for other fiscal years (example: 20-21, or FY21).