Negotiations

User Guide

OVERVIEW

Negotiations

Negotiations, which is an add-on module of the School Accounting System, dovetails with the Payroll and General Ledger modules to aid in the process of determining future salaries for employees. With the Negotiations module, packages are defined and salary schedules are built to calculate total costs of salaries and benefits for various scenarios for comparison purposes. When a settlement has been reached, options within the Negotiations module can be completed in order to post the new employee wages to Payroll, update the deduction rate tables with the new rates entered for the upcoming year (if applicable), print employee contracts (using the mail merge function in Microsoft® Word), and post the total salary and benefits to each line item in a budget batch in General Ledger.

Available Help

<u>Help File</u>
The School Accounting System (including the Negotiations module) features a Help File that includes a table of contents, a topical index, a search option, and context-sensitive help. To open the Help File, select the **Help** menu from any screen and then select **School Accounting System Help**. To the access the table of contents, click the **Contents** tab located in the upper left-hand corner of the screen; to use the topical index, click the **Index** tab; or to complete a search for specific information, click the **Search** tab.

The context-sensitive help provides help text related to a specific field in the data entry and maintenance screens of the School Accounting System and its add-on modules. To access the context-sensitive help, place the cursor on the desired field and then press the **F1** key (or right-click in a field and select **What's This?**).

To print a specific topic in the Help File, bring up the desired topic and then click the **Print** button located at the top of this screen.

<u>Web Page</u>
Access Software Unlimited, Inc.'s web site at **www.su-inc.com** to view the Knowledge Base containing Frequently Asked Questions (FAQs) and Training Tidbits. In order to access the Knowledge Base, you must enter your User ID and Password when prompted. If needed, to create a User ID and Password for the website, click the Website Login Credentials link under the Help & Support section on the main screen of the School Accounting System.

<u>Customer Support Help Line</u>
The Customer Support Help Line is a toll-free number available to our customers from 8 a.m. to 5 p.m. Central Time, Monday through Friday. The annual maintenance fee for the School Accounting System and the add-on modules for which your organization has licensed includes help line assistance for questions related to the School Accounting System and the add-on modules. **To reach our Customer Support Help Line, call 800.756.0035, Ext. 2.** Be ready to give the receptionist your Name, School District, Customer ID, and a brief message regarding the problem. One of our Certified Customer Support Representatives will call you back to assist with problem resolution. Be sure to complete a Customer Support Callback Sheet for each call that you place and file it in your small Reference Binder for future use.

Customer Support Callback Sheet

(Please complete <u>before</u> calling HELPLINE)

800-756-0035 ext. 2

If you cannot reach SUI with the toll-free number, please contact us via the following:
Phone: 605-361-2073 ext. 2   E-mail: support@su-inc.com   Fax: 605-361-5443

Person Calling:_____ Customer ID#:_____

Company Name:_____ Date:_____ Time:_____

Type of Computer:_____ Phone:_____

What part of the System? (Circle one)

Accounts Payable	Human Resources	Fixed Asset Inventory	Warehouse
General Ledger	Negotiations	Accounts Receivable	Other Software
Payroll	Report Writer	Web Link	Other Hardware

What menu option(s)?_____

If an error has occurred, please copy this information from the screen:

Error Number:_____   Error Description:_____

Hardware or Software Question or Problem:

_____
_____
_____
_____
_____

Fill out information below *after* calling HELPLINE:

Helped By: _____ Call Back Date:_____ Time: _____

Description of Resolution:

_____
_____
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Backups

The backup database function, which is accessed by clicking the **Backup** icon on the main screen of the School Accounting System or the Backup option listed under the Check Cycle menus in Accounts Payable and Payroll, makes an encrypted backup file of the database at a specific point in time. Since all the data in the School Accounting System resides in one database, the backup database function backs up all modules including Accounts Payable, General Ledger, Payroll, Fixed Asset Inventory, Human Resources, Negotiations, and Report Writer.

When making a backup in the School Accounting System, the backup file of the database is created in the backup folder in the SQL Server instance and can be copied to a different location, such as to a jump drive, CD, or a location on the user's local hard drive, if desired. The backup files in the backup folder in the SQL Server instance are retained based on the values entered in the Number of Days to Keep Backups field and the Minimum Number of Backups to Keep field in the System File. For a list of the recommended times when an external backup copy should be created within Accounts Payable, Payroll, and General Ledger, and how long the backup copy should be retained, refer to the Recommended Backup Copy and Retention Schedule.

Tips:
- Always make a backup prior to updating files (for example, updating a check cycle) in the School Accounting System.
- In addition to making backups prior to updating files, make regular backups (such as a weekly or daily backup) of your database in the School Accounting System, even if a tech does a nightly or weekly tape backup.
- Develop a schedule for all users as to how often to create external backup copies and how long to retain the backup copies.
- Establish a procedure for storing the backups in a safe place away from the office in case of a fire or other natural disaster.

Note: The School Accounting System can be set up to complete daily backups of the database, if desired. To set up the system to make a daily backup, complete the fields on the Backup Options screen in the System File (refer to Steps 1, 4, and 5 of the Completing the System File topic in the Help File). When making a daily backup, the backup file is only created in the backup folder in the SQL Server instance (an external copy is <u>not</u> made).

Backing Up:

Note: The steps below are for completing the backup database function at a specific point in time in the School Accounting System. If backing up to a CD, be sure to format the CD prior to clicking the Backup icon or selecting the Backup option by completing the format option (or the "Direct CD" option) within the CD writing software program installed on your computer.

1   From the School Accounting System screen, click the **Backup** icon.

   Note: The Backup option can also be accessed by selecting the **Check Cycle** menu and then **Backup** from the Accounts Payable or Payroll screen if backing up prior to updating a batch of checks for Accounts Payable or Payroll. If making a backup as part of completing the Change Account Structure, Crosswalk Account Numbers, or Upload Database to SUI option, or installing an update, skip this step.

2.   At the Backup Database screen (see **Diagram A**), the path for how your computer sees the location for the backup folder on the SQL Server instance appears in the Path to Shared Backup Folder field. The path entered in the Path to Shared Backup Folder field is only utilized if the backup will be copied to a different location from the backup folder, such as to a jump drive, CD, or a location on the user's local hard drive. If the path in the field needs to be changed, utilize the Edit Path to

Shared Backup Folder option (not applicable for school districts using the School Accounting System-Online version).

3. Select the Make Backup Copy field to copy the backup from the backup folder (on the SQL Server instance) to a different location, such as to a jump drive, CD, or a location on the user's local hard drive. A checkmark will appear in the box if the field is selected.

4. If the Make Backup Copy field is selected, the Path for Backup Copy field will be enabled. Enter the destination location for where to make the backup copy in the Path for Backup Copy field, or click the **Directory** button to browse to the desired path and then click the **OK** button. The path last specified when a backup was made on your computer appears as the default, but can be changed.
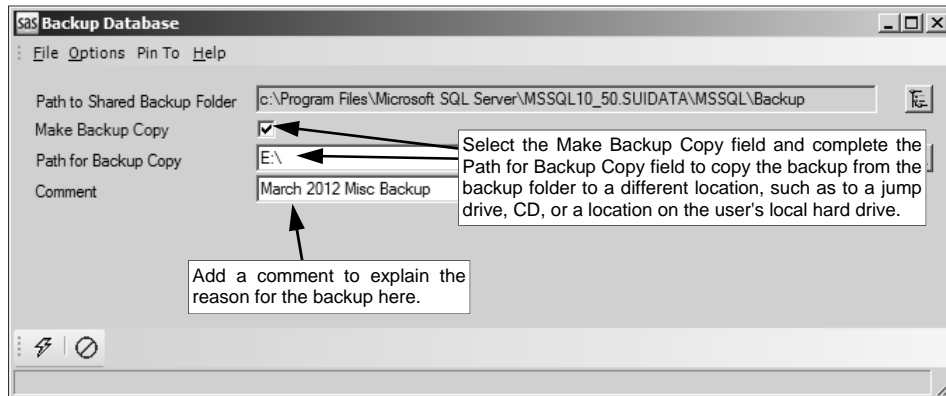
Diagram A

5. Enter a description to explain the reason for making the backup in the Comment field. The description can be up to **1,000** characters long. For example, if making a backup prior to updating a batch of checks in Accounts Payable, enter **Accounts Payable Checks Backup October 2011** in the Comments field. If applicable (such as when making a backup as part of completing an option or installing an update), leave this field blank to use a default description assigned by the system.

6. Click the **Execute** button to backup the database.

   Note: The name of the backup file will include the date and time the backup was made, using the following format: **XX_####_OrganizationName_yyyy-mm-dd_hhmmss**, with **XX** being the appropriate state abbreviation and **####** being the customer ID number for the organization. The backup file created in the backup folder will have a file extension of **.bak**, while the backup file copied to a different location will have a file extension of **.gz**.

7. Once the backup has been made, a message will appear in the status bar stating the backup was created successfully.

Printing Reports

Printing a Report:

1. From the applicable screen, select the **Reports** menu. See **Diagram A**.

   Tips:

   1) If accessing the **Reports** menu from the main screen for a module, select **Report Writer - Standard** if the report to print is a standard report; select **Report Writer - Custom** if the report to print is a custom report; select the Report Search option to search for a particular report within that module; select the appropriate group (for example, Employee Reports, Vendor Reports, etc.) as a short-cut to only view reports pertaining to a particular file or item; or select the "favorites" group for your user to view only the reports designated as a favorite for your User ID. (**Note:** The Report Writer - Custom option is only available if custom reports have been built for the particular module.)

   2) If printing a report *prior to* printing checks during an Accounts Payable or Payroll check cycle, select the **Check Cycle** menu and then **Pre-Check Reports**, or if printing a report *after* printing checks during a check cycle, select the **Check Cycle** menu and then **Post-Check Reports**.

   3) Within the various option or groups of reports, the custom reports are listed with an icon of a blue pencil.

From the **Reports** menu, select the appropriate grouping, and then the desired report to run.
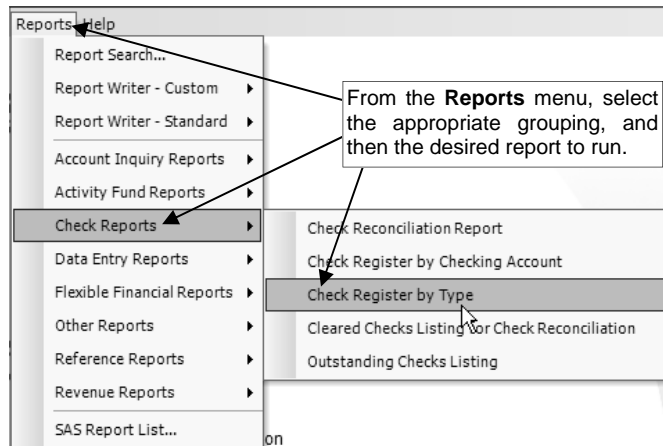
Diagram A

2. Select the desired report.
3. If printing mailing labels, when prompted, select the label setup for which to use by double-clicking on the desired format.
4. Complete the required report printing options, if applicable. See **Diagram B**.

   Tip: If the report printing options for the particular report have been previously saved by clicking the **Save Settings** button, click the **Retrieve Settings** button at this time to display the saved settings.

   a. If applicable, specify the desired type of the report to print in the Report Selection Description field. For example, when printing the Balance Sheet in General Ledger, select either **Monthly** or **Annual**, depending on which type of balance sheet to print. The default report selection will appear in the Report Selection Description field but can be changed by clicking the **down-arrow** button and selecting the correct one.

   b. If applicable, specify the variable values for each field listed in the Variable Fields section to determine what information to print on the report. When entering the value for a date, month, or year variable field, use the format of **mm/dd/yyyy** for a date, **mm/yyyy** for a month, or **yyyy** for a year, or click the **down-arrow** button to select the desired date, month, or year.

   c. If applicable, specify the ranges or select only certain records for each field listed in the Report Parameter section to determine what information to print on the report. To select the desired records to include on the report for the parameter fields, complete one of the following:

   - Click the **Search** button to select specific records. When using the **Search** button, only the records applicable for the other specified selections will appear (for example, if a particular pay group has been specified on a Payroll report, only the employees in the particular pay group will appear when clicking the **Search** button for the Employee ID parameter).

     Note: If the **Search** button is used to select specific records, the number of records selected will appear to the right of the button (or if the description of the selected records will

fit in the space allotted for the display, the description of those selected records will display instead).

- Enter the desired starting record to include on the report in the From field and the ending record to include in the To field. If the parameter field is for a date or month, use the format of **mm/dd/yyyy** when entering a date or **mm/yyyy** for a month, or click the **down-arrow** button to select the desired date or month.

Diagram B

- Enter the records to include on the report using the wildcard characters (**%** or _) as placeholders in your variable search information for the parameters in the From field. Use the percent sign (**%**) as a placeholder for an unlimited number of characters and the underscore (_) as a placeholder for one character. For example, enter **G%** in the From field for a Vendor ID parameter to print all vendors defined with an ID starting with the letter G. **When entering a mask for account numbers using the wildcard characters, be sure to key spaces between the account dimensions.**

- Enter the particular range of records to include using a "z". To print a range, enter the beginning information of the first records to print in the range in the From field for the desired parameter; then in the To field for that parameter, enter the beginning information of the last records to print in the range followed by a "z" at the end of the string. For example, to print all vendors defined with an ID starting with letters A through H, enter **A** in the From field for a Vendor ID parameter and enter **Hz** in the To field. **When entering a range for account numbers using a "z", be sure to key spaces between the account dimensions.**

Tip: If there are parameters selected by default (for example, a batch is selected by default), click the **Clear Parameters** button, if desired, to clear the defaults so that all records are selected for each item.

d. If desired, enter a description to use as a sub title for the report in the Sub Heading field. The sub heading can be up to **255** characters long. If the Auto Copy Report Choices field is selected within the User Options option, a default sub heading will appear but can be changed.

Tip: Click the **Copy Choices** button to automatically copy the selections made to the report, such as the specified Report Selection Description and selected parameters, into the Sub

Heading field (only applicable if the Auto Copy Report Choices field is not selected within the User Options option).

   e. Select the Print Negative Numbers in Red field to have the numeric values that are negative on the report appear in red on the preview screen and print in red (provided a color printer is utilized). A checkmark will appear in the box if the field is selected. The Print Negative Numbers in Red field will be selected by default if the Print Negative Numbers in Red field is selected within the User Options option or the User Security option for the specified user.

   f. Select the Include Page Header/Footer field to print the information included in the Page Header and Page Footer sections on the report. A checkmark will appear in the box if the field is selected. This field will be selected by default. Typically, this field is only unselected if the report will be exported to a format in which the page header and page footer sections should be omitted, such as when exporting to a Microsoft® Excel spreadsheet file.

   g. Only the following items can be changed for the Report Sorting section; otherwise, if other changes are made, the report will <u>not</u> print correctly.

- If the [vprEmployeePersonnelReference].[NoCustomReferencedID] field appears as a Report Sorting field, click the **Search** button to select the desired referenced custom field on which to sort the information included on the report.

- If applicable, for each Report Sorting field listed, select the New Page After field to insert a page break after the specified item. For example, if printing the Deduction Register by Deduction report, select the New Page After field for the [vprDeductionsAndTaxes]. [DeductionID] report sorting field to have each deduction print on a separate page.

  Note: If the selected report was built with a defined page break for a particular item, the New Page After field will be selected by default for that item, but can be changed. Each time the report is printed, only the default page breaks will be selected.

- Only when printing the applicable reports, such as the Employee Detail Listing for Payroll, select the Footer Visible field to remove the checkmark for any section to omit (<u>not</u> print). Be sure to leave the Header Visible field unselected.

   h. If applicable, select the Displayed field for any optional field and the corresponding label field listed in the Optional Fields section to print the specified field on the report. A checkmark will appear in the box if the Displayed field is selected and the optional field will print on the report.

5. If desired, click the **Save Settings** button at this time to save the specified report printing options in order to run the report with these exact settings in the future by utilizing the **Retrieve Settings** button. If you do <u>not</u> click the **Save Settings** button at this time, the settings must be re-entered the next time the report is generated.

   Tip: A report can also be set as a favorite report (for the user) at this time by clicking the **Favorite Reports** button, or the report can be added to the user's report list accessed under the Reports menu on a module's main screen by clicking the **Report List** button.

6. Click the appropriate button for the desired output:

   a. To preview the report on the screen, click the **To Screen** button.

   b. To print the report directly to the printer, click the **To Printer** button.

   c. To export the report to a file, click the **Export** button and then complete the Export Options as desired.

   Tip: A report previewed on the screen can also be exported to a file by clicking the **Export** button on the preview screen.

   d. To email the report, click the **Email** button. Refer to the Emailing a Report topic for requirements to email a report.

   Tip: A report previewed on the screen can also be emailed by clicking the **Email** button on the preview screen.

7. After the report is printed, click the **X** in the upper right-hand corner to close the reporting printing options screen, if applicable.

Negotiations System File

The Negotiations System File includes customized information pertaining to the Negotiations module for your organization.

Completing the Negotiations System File:

1. From the Negotiations screen, select the **Maintenance** menu and then **Negotiations System File**.
2. Enter the **4-digit** year of the next fiscal year's ending date in the Negotiation Year End field. For example, if the current fiscal year is 2020-2021, the year entered in this field is **2022**. See **Diagram A**.
3. Click the **Save** button.

Diagram A

MAINTENANCE

Packages

Packages are used in the Negotiations module to define specific groups of employees that make up one bargaining unit. Several packages can be created for the same groups of employees for comparison purposes, with each package including the same or different deduction rates, salary base, and salary increases. After a package is created, salary schedules are built to calculate the total cost of salaries and benefits for each package.

Adding a Package:

1. From the Negotiations screen, select the **Maintenance** menu and then **Packages**.

2. Click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the package in the Package ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

    Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

4. Select the Active field to stipulate the package is currently active and used by the district. A checkmark will appear in the box if the field is selected. When adding a new package, the Active field is selected by default.

5. Enter a description for the package in the Package Description field. The description can be up to **40** characters long.

6. Enter the appropriate type for the package (**Extracurricular**, **Regular Contracts**, or **Unit**) in the Package Type field, or click the **down-arrow** button to select the correct one. If the package is for employees paid with contract pay codes for extracurricular wages, enter **Extracurricular**. If the package is for employees paid with contract pay codes for regular wages, enter **Regular Contracts**. If the package is for employees paid with unit pay codes, enter **Unit**.

Diagram A

7. If **Extracurricular** is specified as the Package Type, the Main Package ID field will be enabled. If the package for the extracurricular wages uses the salary schedule from another package, enter the ID for the package it is tied to in the Main Package ID field, or click the **down-arrow** button to select the correct one; otherwise, leave this field <u>blank</u>.

8. Enter the **4-digit** year of the ending fiscal year for which to negotiate the salaries for the package in the Negotiation Year End field. The year can range from **2000** to **2030**. Leave this field <u>blank</u> to default to the year entered in the Negotiation Year End field in the Negotiations System File. Typically, the year entered in this field is the ending year of the *next* fiscal year; for example, if the current fiscal year is 2020-2021, the year entered in this field is **2022**.

9. If an existing package had been updated, the date the Update Payroll with Packages option was completed appears in the Update Payroll Date field and <u>cannot</u> be changed.

10. The Nebraska Comparison Package field will only be enabled for Nebraska school districts. If applicable, select the Nebraska Comparison Package field if the package will be used to build the salary schedule for a neighboring district for comparison purposes. A checkmark will appear in the box if the field is selected.

    Note: If the Nebraska Comparison Package field is selected, when a change is made to the Step and/or Lane fields on the Negotiations tab of the Wages screen in the Employee File, the updated step and lane numbers will <u>not</u> be reflected in the Employee Negotiation Rates option for the package. Also, if the Nebraska Comparison Package field is selected, the package will <u>not</u> be able to be updated.

11. Enter the direction (**Across** or **Down**) of the steps on the salary schedules to be built for the package in the Step Orientation field, or click the **down-arrow** button to select the correct one. To have the steps go across as the columns on the salary schedules for the package, enter **Across**. To have the steps go down as the rows on the salary schedules for the package, enter **Down**.

12. In the Starting Step field, enter either **0** or **1** to be used as the *first* step on the salary schedules for the package. The starting step is just the preference of the school district for whether the first step is *Step 0* or *Step 1*.

13. Enter the maximum number of steps to be used on the salary schedules for the package in the Ending Step field. The number entered here will be the number of the *last* step on the salary schedules.

14. Enter the maximum number of lanes to be used on the salary schedules for the package in the Ending Lane field. The number entered here will be the number of the *last* lane on the salary schedules.

    Note: The number entered in the Ending Step field multiplied by the number entered in the Ending Lane field <u>cannot</u> be greater than 6,500.

15. If the steps in each lane on the salary schedules for this package end diagonally to the last lane, select the Diagonal field. For example, if the maximum step on the salary schedule is 10, the last lane would have all 10 steps, but the second to the last lane would only have 9 steps, and the third to the last lane would have 8 steps, and so on. A checkmark will appear in the box if the field is selected.

16. All the active pay codes matching the specified package type for the package (if applicable) appear in the Pay Codes List. Specify the pay codes that will be negotiated with the package by clicking the box under the Selected column to the left of each desired pay code. A checkmark will appear in the box if the pay code is selected. To select all the pay codes, click the **Select All** button located above the Pay Codes List. If desired, change the filters to modify the pay codes displayed here.

17. All the pay groups appear in the Pay Groups List. Specify the pay groups of employees that will be negotiated with the package by clicking the box under the Selected column to the left of each desired pay group. A checkmark will appear in the box if the pay group is selected. To select all the pay groups, click the **Select All** button located above the Pay Groups List.

18. Click the **Save** button.

<u>Changing a Package</u>:

1. From the Negotiations screen, select the **Maintenance** menu and then **Packages**.

2. At the Packages screen, enter the ID of the package to change in the Package ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes to the package.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the package was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the package, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

6. If the number in the Starting Step, Ending Step, or Ending Lane fields was changed, or the Diagonal field was changed, a prompt will appear to reconfigure the salary schedule dimensions; click **Yes** to change the dimensions of the package and reconfigure the salary schedules for the package.

Copying a Package:

1. From the Negotiations screen, select the **Maintenance** menu and then **Packages**.

2. At the Packages screen, select the **Options** menu and then **Copy Package**.

3. At the Copy Package screen, enter the ID of the existing package to copy in the Package ID to Copy field, or click the **down-arrow** button to select the correct one. See **Diagram B**.

4. Enter a unique ID for the new package to create in the Package ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the package is copied, the ID will be assigned.

5. Enter a description for the new package in the Package Description field. The description can be up to **40** characters long.

6. Enter the **4-digit** year of the ending fiscal year for which to negotiate the salaries for the new package in the Negotiation Year End field. The year can range from **2000** to **2030**. Leave this field <u>blank</u> to default to the year entered in the Negotiation Year End field in the Negotiations System File. Typically, the year entered in this field is the ending year of the *next* fiscal year; for example, if the current fiscal year is 2020-2021, the year entered in this field is **2022**.

Diagram B

7. For Nebraska school districts only, if the Nebraska Comparison Package field was selected for the package specified in the Package ID to Copy field, the Increment Step field will be enabled. If applicable, select the Increment Step field to automatically increment the step of each employee in the Employee Negotiation Rates option for the new package. For example, if the employee is currently at Step 3 for the package being copied, the employee would be placed at Step 4 in the new package. A checkmark will appear in the box if the field is selected.

8. Click the **Execute** button.

Deleting a Package:

Note: If a package has had the Calculate Budget option or the Update Payroll with Packages option completed for it, the system will <u>not</u> allow it to be deleted; however, a package can be made inactive by removing the checkmark for the Active field within the Packages option.

1. From the Negotiations screen, select the **Maintenance** menu and then **Packages**.

2. At the Packages screen, enter the ID of the package to delete in the Package ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the package to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Define Pay Scales

Enter the labels for each step and lane on the salary schedules for each package. The pay scales (steps and lanes) are defined in the Salary Schedules option.

Adding Labels for Steps and Lanes in a Salary Schedule:

1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to add the labels in the Package ID field, or click the **down-arrow** button to select the correct one.

3. The Salary Schedule - Amounts table for the specified package will display.

4. Click the **Edit** tab; or if desired, double-click on a cell (step and lane) on the table instead to view the information specific to the particular cell and then continue with Step 7.

5. Enter the number of the desired step to view in the Step field, or click the **down-arrow** button to select the correct one. See **Diagram A**.

6. Enter the number of the desired lane to view in the Lane field, or click the **down-arrow** button to select the correct one.

7. Enter the description (up to **34** characters) for the step in the Step Description field. If the brackets or the number are deleted, the system will automatically add them back in and truncate the description to **34** characters (if **35** or more characters were entered).

8. Enter the description (up to **34** characters) for the lane in the Lane Description field. If the brackets or the number are deleted, the system will automatically add them back in and truncate the description to **34** characters (if **35** or more characters were entered).

9. Click the **Save** button.

10. Repeat Steps 5-9 until the descriptions have been entered for all the steps and lanes.

11. When done, click the **Salary Schedules** tab to view the tables with the newly added labels for the steps and lanes.

Diagram A

Deduction Rates

The Deduction Rates option in Negotiations is used to enter different rates for deductions (than what is currently defined in Payroll) for use when calculating benefit totals in Negotiations. The deductions for which new rates will be entered must be set up with a rate table. Deduction Rates are tied to a package, which allows the same deduction to have two (or more) different rates for two (or more) different packages.

Entering Deduction Rates:

Note: Complete the steps below to include different rates for deductions (than what is currently defined in Payroll) when calculating in Negotiations. The deductions for which new rates will be entered must be set up with a rate table. If the applicable deductions are <u>not</u> currently set up with a rate table, convert the deductions at this time using the Convert to Rate Table option (accessed under the **Options** menu in the Deduction File).

1. From the Negotiations screen, select the **Maintenance** menu and then **Deduction Rates**.
2. At the Deduction Rates screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter the ID of the package for which to enter the new rates for deductions in the Package ID field, or click the **down-arrow** button to select the correct one. See **Diagram A**.
4. Enter the ID of the deduction for which to enter the rates in the Deduction ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
5. If applicable, select the Exclude Deduction field to <u>not</u> include the specified deduction in the calculations in Negotiations for the particular package. A checkmark will appear in the box if the field is selected.
6. The standard rates (and new rates, if applicable) currently entered on the rate table in Payroll for the specified deduction appear in the Rate Table List. For each rate for the deduction in which a different amount should be included in the calculations for the package in Negotiations, complete the following:
   a. Enter the new amount to be withheld from the employee's earnings in the Employee Rate field in the Negotiations Rates section. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system.
   b. Enter the new amount to be expensed and paid by the employer in the Employer Rate field in the Negotiations Rates section. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system.

Diagram A

     c. The system will automatically calculate the total of the two new amounts and display it in the Rate Total field in the Negotiations Rates section. The amount displayed in the Rate Total field <u>cannot</u> be edited.

7. Click the **Save** button.

8. Repeat Steps 4-7 until all the new rates have been entered for the desired deductions for the specified package.

Changing Deduction Rates:

Note: Complete the steps below to change the rates previously entered for deductions for a package in Negotiations. If rates have <u>not</u> been previously entered for the package, follow the steps to enter deduction rates instead.

1. From the Negotiations screen, select the **Maintenance** menu and then **Deduction Rates**.

2. At the Deduction Rates screen, enter the ID of the package for which to edit the new rates for deductions in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Enter the ID of the deduction for which to edit the new rates in the Deduction ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

4. Make the desired changes for the deduction.

5. After all the changes have been made, click the **Save** button.

Employees - Fields to Complete for Negotiations

Complete the FTE, Step, Lane, Total Payments (for *unit* pay codes only), Total Hours (for *unit* pay codes only), and Primary Pay Code (for *contract* pay codes only) fields on the Wages screen of the Employee File for all pay codes that will be included in a package in Negotiations for each employee. If you used Negotiations last year, the fields will already be completed for those employees included in the packages last year, but make any necessary changes and verify the information for any new employees added throughout the year. Also, If applicable, complete the Annual Total field on the Deductions screen for all declining balance deductions that will be calculated in Negotiations.

Completing the Employee File for Negotiations:

1. From the Negotiations screen, select the **Payroll** menu and then **Employees**.
2. At the Employees screen, click the **First Record** button to view the first employee.
3. Click the **Wages** tab to view the pay codes for the employee.
4. Then click the **Negotiations** tab located in the upper right-hand corner of the screen (below the **Wages** tab) to view the negotiations information for the employee. See **Diagram A**.
5. Select each contract and unit pay code that will be included in a package for the employee by double-clicking on the pay code in the Employee Wages List located in the lower left corner of the screen, or by entering the ID of the desired pay code to edit in the Pay Code ID field and then entering the appropriate **4-digit** year in the Fiscal Year End field.
6. Enter the FTE for the employee for this pay code in the FTE field. The FTE can be up to **6** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.
7. Enter the number of the current step for the employee for this pay code in the Step field. The step number <u>cannot</u> be *greater than* **999**, and will be rounded to **2** decimal places by the system.

Diagram A

8. Enter the number of the current lane for the employee for this pay code in the Lane field. The lane number can be up to **3** digits long (no decimals).

   Note: If you have the Human Resources module, leave the Lane field blank and complete the Negotiation Lanes option within Human Resources in order to have the system place the employees in the correct lanes as based on their degree and additional credit hours (for example, BA + 6 additional credit hours) or position title (for example, Head Football Coach), if desired. If position titles will be used, enter the ID of the position title that corresponds to the position for which the employee is assigned in the Position Title ID field (Position Title ID field is only enabled if the school district has the Human Resources module).

9. For all unit pay codes, enter the number of times the employee will get paid in the Total Payments field. The number can be up to **14** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **4** decimal places by the system if capable. See **Diagram B**.

10. For all unit pay codes, enter the total hours the employee is estimated to work in the fiscal year in the Total Hours field. The number can be up to **8** digits long (including the decimal point) and will be rounded to **2** decimal places by the system if capable.

11. For all contract pay codes, select the Primary Pay Code field if the contract is the main contract for the employee. A checkmark will appear in the box if the field is selected.

Diagram B

   Note: The Primary Pay Code field is used by the system to sort contracts on particular reports (specifically with the Export Pay Codes for Mail Merge option) used in Negotiations in order to list the main contract first, if an employee has more than one contract.

12. Click the **Next Record** button to advance to the Wages screen for the next employee; when prompted to save the changes before continuing, click **Yes**.

13. Repeat Steps 5-12 until all the employee records have been completed.

14. If applicable, complete the Annual Total field for the employee and/or employer share on the Deductions screen for all declining balance deductions that will be calculated in Negotiations. **Only complete the Annual Total field for the declining balance deductions to be used in Negotiations that are paid by the employer, or are pre-tax and paid by the employee (which affects taxes paid by the employer).**

   a. Click the **Deductions** tab to view the deductions for the employee.

   b. Select each desired deduction by double-clicking on the deduction in the Employee Deductions List located in the lower left corner of the screen, or by entering the ID of the desired deduction to edit in the Deduction ID field.

   c. Enter the total amount to be withheld or expensed for this fiscal year for the deduction in the Annual Total field for the employee and/or employer share. The amount can be up to **14** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **2** decimal places by the system if capable. See **Diagram C**.

   d. Click the **Next Record** button to advance to the Deductions screen for the next employee; when prompted to save the changes before continuing, click **Yes**.

   e. Repeat these steps until all the employee records have been completed.

pr Employees

File Options Reports Pin To Help

Employee ID   WILLBER   🔍   Bert Williamson

Military Service | Positions | Taxes | Trainings | Wages | Work Comp | Name & Address | Benefits | Certificates | Custom Fields | **Deductions**

Applies To: pr

Deduction ID   UNITEDWAY   Member Number

Comments

> Complete the Annual Total field for the employee and/or employer share on the Deductions screen for all declining balance deductions that will be calculated in Negotiations.

Individual Bank Account Deduction

Account Number

Direct Deposit Transaction Code

Direct Deposit Bank ID

Standard Entry Class Code

Addenda

> Enter the amount to be withheld or expensed for the fiscal year here.

Employee

Active	☑	Declining ☑
Rate Type	Fixed	Balance 250.00
Start Date	09/01/2011	Annual Total 300.00
End Date		Regular Pay Period Only ☐
		Process if No Pay ☐

Employer

Active	
Rate Type	
Start Date	
End Date	

Diagram C

Create Payroll Wages for New Year

The Create Payroll Wages for New Year option is accessed from the Options menu in Negotiations. The Create Payroll Wages for New Year option is used to create the selected pay codes tied to the next fiscal year for employees in the specified pay groups for use with the Negotiations module.

With the Create Payroll Wages for New Year option, wages can be created for the new fiscal year with zero dollars OR the wages can be created with the previous year's amounts if the school district needs to start paying employees before a settlement has been reached. The wages are created for only employees with a status of Active that match the specified criteria (pay groups and pay codes). The Start Date on the new wages (applicable for contract pay codes only) will use the same Start Date as the previous year's wages except with the year incremented or use a specified Start Date. When creating the new wages for use in the Negotiations module, the steps for employees can be incremented, if desired. Also, the information entered in the Regular Days (for contract pay codes only), Additional Days (for contract pay codes only), Additional Dollars, Additional Percent, and Additional Degree Hours fields will be copied across to the new wages.

The Create Payroll Wages for New Year option can also be used to delete a new fiscal year's wages if the wages were created in error.

Creating Payroll Wages for New Year for Negotiations:

1. From the Negotiations screen, select the **Options** menu and then **Create Payroll Wages for New Year**.
2. At the Create Payroll Wages for New Year screen, enter the **4-digit** year of the ending fiscal year date for which to create the new wages in the New Fiscal Year End field. For example, if creating wages for the 2012-2013 fiscal year, enter **2013** in this field. See **Diagram A**.
3. Enter the type of action to complete (**Copy Previous Year Wages**, **Create Blank Wages**, or **Delete New Fiscal Year Wages**) in the Wages field, or click the **down-arrow** button to select the correct one. To create wages with the previous year's amounts, enter **Copy Previous Year Wages**. To create wages with zero amounts, enter **Create Blank Wages**. To delete wages for a new fiscal year that were created in error (only those wages that have <u>not</u> been used will be deleted), enter **Delete New Fiscal Year Wages**. Typically, **Create Blank Wages** is used for purposes of creating wages in Negotiations.
4. If wages already exist for the specified year, select the Overwrite Existing Wages field to replace the existing wages with the newly created wages. A checkmark will appear in the box if the field is selected.

    Note: The Overwrite Existing Wages field is disabled and <u>not</u> applicable if **Delete New Fiscal Year Wages** is specified in the Wages field.
5. If desired, enter the date on which the contract pay codes to be created for the new year should start to be paid in the Start Date field; otherwise, leave the Start Date field <u>blank</u> to use the same Start Date as the previous year's wages except with the year incremented. If applicable, use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    Note: The Start Date field is disabled and <u>not</u> applicable if **Delete New Fiscal Year Wages** is specified in the Wages field.
6. Select the Increment Step field to automatically increment the step of each employee when creating the new wages. For example, if the employee's wage is currently at Step 3, the new wage would be created at Step 4. A checkmark will appear in the box if the field is selected. This field is selected by default.
7. All the pay groups appear in the Pay Group Selection List. Specify which pay groups to include when creating (or deleting) the new wages by clicking the box for the Selected column to the left of the desired pay group. A checkmark will appear in the box if the pay group is selected. To select all

Diagram A

the pay groups listed on the screen, click the **Select All** button located above the Pay Group Selection List. If desired, change the filters to modify the pay groups displayed here.

8. All the active pay codes appear in the Pay Code Selection List. Specify which pay codes to create (or delete) for the new fiscal year by clicking the box for the Selected column to the left of the desired pay code. A checkmark will appear in the box if the pay code is selected. To select all the pay codes listed on the screen, click the **Select All** button located above the Pay Code Selection List. If desired, change the filters to modify the pay codes displayed here.

9. Click the **Execute** button.

10. After the process is completed, the system will display a message in the status bar.

Completing the Wages Screen in the Employee File:

Note: After creating the pay codes for the new year, complete the Wages screen in the Employee File for the new pay codes for any employees who are contracted to work any additional days, receive an additional amount (percentage or fixed dollar amount), or have earned additional degree hours for which they will be paid an extra amount.

1. From the Negotiations screen, select the **Payroll** menu and then **Employees**.

2. At the Employees screen, click the **First Record** button to view the first employee.

3. Click the **Wages** tab to view the pay codes for the employee.

4. Click the **Negotiations** tab located in the upper right-hand corner of the screen (below the **Wages** tab) to view the negotiations information for the employee.

5. Select each new contract and unit pay code that needs to be edited by double-clicking on the pay code in the Employee Wages List located in the lower left corner of the screen, or by entering the ID of the desired pay code to edit in the Pay Code ID field and then entering the appropriate **4-digit** year in the Fiscal Year End field. See **Diagram B**.

6. For contract pay codes only, enter the number of additional days the employee is contracted to work (beyond the regular number of days) in the Additional Days field, if applicable. The number of additional days cannot be *greater than* **999**, but can be up to **8** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

7. If the employee is to be paid an additional dollar amount on what is calculated in the package for this pay code for the employee's step and lane, enter the dollar amount in the Additional Dollars field. If an amount is entered in this field for a contract pay code, the amount will be added to the total wages for the pay code from the package (or subtracted, if a negative amount is entered); for example, if $1,500 is entered in this field and the total wages from the package for the employee's step and lane for the pay code is $20,000, the final amount for the pay code for the employee would

be $21,500. If an amount is entered in this field for a unit pay code, the amount will be added to the unit rate for the pay code from the package before multiplying it with the number of hours (or subtracted, if a negative amount is entered); for example, if $0.25 is entered in this field and the unit rate from the package for the employee's step and lane for the pay code is $5.50, the final amount for the pay code for the employee would be $5.75 multiplied by the number of hours. The amount can be up to **14** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **2** decimal places by the system if capable.

8. If the employee is to be paid an extra amount for each additional degree hour earned (on what is calculated in the package for this pay code for the employee's step and lane), enter the number of degree hours for which to pay the employee in the Additional Degree Hours field. The amount can be up to **10** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **4** decimal places by the system if capable.

    Note: The amount to pay for each additional degree hour will be entered when calculating the salary schedules.

9. If the employee is to be paid an additional percentage on what is calculated in the package for this pay code for the employee's step and lane, enter the percentage in the Additional Percent field. If a percentage is entered in this field for a contract pay code, the percentage will be added to the total wages for the pay code from the package (or subtracted, if a negative percentage is entered); for example, if 2.5% is entered in this field and the total wages from the package for the employee's step and lane for the pay code is $20,000, the final amount for the pay code for the employee would be $20,500. If a percentage is entered in this field for a unit pay code, the percentage will be added to the unit rate for the pay code from the package before multiplying it with the number of hours (or subtracted, if a negative percentage is entered); for example, if 2% is entered in this field and the unit rate from the package for the employee's step and lane for the pay code is $5.50, the final amount for the pay code for the employee would be $5.61 multiplied by the number of hours. The percentage can be up to **10** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **4** decimal places by the system if capable.

10. Click the **Next Record** button to advance to the next employee's wage screen; when prompted to save the changes before continuing, click **Yes**.

11. Repeat the steps until all the necessary employees have been completed.

Diagram B

Salary Schedules

Salary Schedules are the tables used in Negotiations to define the pay scale for the school district. Within the Salary Schedules option, five different tables can be built for each package, including the Salary Schedule - Amounts table, Salary Schedule - Percents table, FTE - Hours table, Salary Totals table, and Benefit Totals table.

If percents are used on the pay scale OR steps and lanes increment by percentages or fixed dollar amounts, build the Salary Schedule - Percents table first. Otherwise, if each step and lane has a fixed dollar amount that is incremented without consistency, build the Salary Schedule - Amounts table first (and do <u>not</u> build the Salary Schedule - Percents table). The Salary Schedule - Amounts table (if applicable) and the FTE - Hours table must be built prior to the Salary Totals and Benefit Totals tables. Also, the Salary Totals table must be built before the Benefit Totals Table.

Note: If all the employees in one package will have a fixed percentage or dollar increase from their previous year's wages, the Salary Schedule - Percents or Salary Schedule - Amounts tables do <u>not</u> need to be built; only build the FTE - Hours, Salary Totals, and Benefit Totals tables.

Tips:
- Once a table has been built successfully, lock the table to prevent if from being accidentally recalculated.
- A table created for one package can be copied to another package using the Copy Table option, or the Copy Package option can be used instead to copy an entire package including all the tables (and the labels for the steps and lanes).
- The salary schedules (tables) for a package can be exported to a spreadsheet file, if desired; refer to the Viewing Salary Schedules topic.
- The Salary Schedule - Amounts table for a package can be imported from a spreadsheet file, if desired.

Building (Recalculating) a Salary Schedule - Percents Table:
1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.
2. At the Salary Schedules screen, enter the ID of the package for which to build the new Salary Schedule - Percents table in the Package ID field, or click the **down-arrow** button to select the correct one.
3. Click the **Recalculate** tab.
4. Click the **Salary Schedule - Percents** tab.
   Note: If the table is locked, the tab will be disabled; if needed, unlock the table.
5. Complete the Salary Schedule - Percents Recalculate Options List to define the options for calculating the table. If the calculations on the table are consistent throughout, only enter one line using the dimensions for the entire package; otherwise, multiple ranges of cells (steps and lanes) can be entered with different options stipulated, if needed. To enter the calculate options for a range, complete the following:
   a. In the blank line (indicated with an asterisk) at the bottom of the Salary Schedule - Percents Recalculate Options List, enter the number of the first step to calculate in the Starting Step field, or click the **down-arrow** button to select the correct one. See **Diagram A**.
   b. Enter the number of the last step to calculate in the Ending Step field, or click the **down-arrow** button to select the correct one.
   c. Enter the number of the first lane to calculate in the Starting Lane field, or click the **down-arrow** button to select the correct one.

d. Enter the number of the last lane to calculate in the Ending Lane field, or click the **down-arrow** button to select the correct one.

e. If the steps increment by percentages, enter the percent increase for each step in the specified range in the Step Percent Increment field. For example, if the steps increase by 3%, enter **3** in this field. The percentage can be up to **12** digits long (including the decimal point) and will be rounded to **4** decimal places if capable. If the steps do not increment by percentages, enter a **0** in this field or leave it blank.

f. If the specified range includes the first step in the package, the Lane Percent Increment field is enabled. If the lanes increment by percentages, enter the percent increase for each lane in the specified range in the Lane Percent Increment field. For example, if the lanes increase by 4%, enter **4** in this field. The percentage can be up to **12** digits long (including the decimal point) and will be rounded to **4** decimal places if capable. If the lanes do not increment by percentages or each lane is calculated on a different base, enter a **0** in this field or leave it blank.

Diagram A

g. Enter the number of decimal places (**0** to **4**) to use when calculating the table in the Decimal Places field.

Note: The number entered here is not the number of the decimal places that will automatically be displayed on the table, as the table defaults to show **2** decimal places unless a greater number is entered here and the amount in the cell contains a value with that number of decimals. For example, if **0** is entered in this field, the system will calculate the amounts using **0** decimals, but the table will display the amounts with **2** decimal places (the decimals will be all zeros since decimal places were not calculated); or if **4** is entered in this field, the system will calculate the amounts using **4** decimals, but the table will only display the amounts with **4** decimal places if the amount contains **4** decimals (otherwise, **2** (or **3**, if applicable) decimal places will show on the table).

h. If the steps increment by fixed dollar amounts rather than or in addition to percents, enter the dollar amount increase for each step in the specified range in the Step Dollar Increment field. For example, if the steps increase by $500, enter **500** in this field, or if the steps increment by 25 cents, enter **0.25** in this field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable. If the steps do not increment by dollar amounts, enter a **0** in this field or leave it blank.

Note: The amount entered in this field will be the amount in the Additional Dollars field for each step in the specified range (excluding the first step in the package, if applicable); for example, if the Step Dollar Increment is $500, $500 will be in the Additional Dollars field for all the steps in the range (except the first step in the package, if applicable).

i. If the specified range includes the first step in the package, the Lane Dollar Increment field is enabled. If the lanes increment by fixed dollar amounts rather than or in addition to percents, enter the dollar amount increase for the lanes in the specified range in the Lane Dollar Increment field. For example, if the lanes increase by $250, enter **250** in this field, or if the lanes increment by 25 cents, enter **0.25** in this field. The amount can be up to **14** digits long (including

the decimal point) and will be rounded to **4** decimal places by the system if capable. If the lanes do <u>not</u> increment by dollar amounts or each lane is calculated on a different base, enter a **0** in this field or leave it <u>blank</u>.

Note: The amount entered in this field will be the amount in the Additional Dollars field for the first step in each lane in the specified range (excluding the first lane in the package, if applicable); for example, if the Lane Dollar Increment is $250, $250 will be in the Additional Dollars field for the first step for all the lanes in the range (except the first lane in the package, if applicable). The amount entered in this field can be calculated progressively for each lane, if applicable, by selecting the Geometric Progression field (see below); then the amounts in the Additional Dollars field for the first step in the lanes in the range would be $250, $500, $750, $1,000, and so on.

j. If applicable, select the Zero field to delete (zero out) the amount calculated as the Step Dollar Increment and/or Lane Dollar Increment in the specified range. A checkmark will appear in the box if the field is selected.

k. If applicable, select the Geometric Progression field if the percentage entered in the Step Percent Increment and/or Lane Percent Increment fields is calculated on the previous step and lane rather than as an additional percentage of the base, or if the amount entered in the Lane Dollar Increment field is calculated on the previous lane rather than as an additional amount of the base. For example, select the Geometric Progression field if the percent increment is an additional 5% on the previous step and lane and the amounts should be 100%, 105%, 110.25%, 115.7625%, and so on, instead of 100%, 105%, 110%, 115%, etc.; or if the dollar increment for the lanes is an additional $250 on the previous lane and the amounts should be $250, $500, $750, $1,000, and so on, instead of $250 for each lane. A checkmark will appear in the box if the field is selected. The Geometric Progression field is only applicable if using the Step Percent Increment, Lane Percent Increment, and/or Lane Dollar Increment fields.

l. If applicable, repeat these steps until the calculate options for all the ranges have been entered.

Note: If needed, to remove the calculate options for a range, click the **Delete** button located to the left of the desired line in the Salary Schedule - Percents Recalculate Options List; when prompted to delete the record, click **Yes**.

6. Click the **Execute** button to build the table as specified, or click the **Save** button to save the changes and wait to calculate the table at a later time.

7. After building the table, click the **Salary Schedules** tab and then the **Salary Schedule - Percents** tab located on the bottom of the screen to view the table. See **Diagram B**.

8. Once the table has been built successfully, lock the table to prevent it from being accidentally recalculated.

Diagram B

Building (Recalculating) a Salary Schedule - Amounts Table:

Note: In most cases, the Salary Schedule - Percents table should be built before the Salary Schedule - Amounts table.

1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to build the new Salary Schedule - Amounts table in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Click the **Recalculate** tab.

4. Click the **Salary Schedule - Amounts** tab.

   Note: If the table is locked, the tab will be disabled; if needed, unlock the table.

5. Complete the Salary Schedule - Amounts Recalculate Options List to define the options for calculating the table. If the calculations on the table are consistent throughout, only enter one line using the dimensions for the entire package; otherwise, multiple ranges of cells (steps and lanes) can be entered with different options stipulated, if needed. To enter the calculate options for a range, complete the following:

   a. In the blank line (indicated with an asterisk) at the bottom of the Salary Schedule - Amounts Recalculate Options List, enter the number of the first step to calculate in the Starting Step field, or click the **down-arrow** button to select the correct one. See **Diagram C**.

   b. Enter the number of the last step to calculate in the Ending Step field, or click the **down-arrow** button to select the correct one.

   c. Enter the number of the first lane to calculate in the Starting Lane field, or click the **down-arrow** button to select the correct one.

   d. Enter the number of the last lane to calculate in the Ending Lane field, or click the **down-arrow** button to select the correct one.

   e. Enter the dollar amount to use as the base for the specified range in the Base field, if applicable. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

      Note: The Base field is only enabled if **Base** is specified as the Salary Calculation Type, or if **First Step in Lane** or **Previous** is specified as the Salary Calculation Type <u>and</u> the specified range includes the first step in the package.

   f. Enter the number of decimal places (**0** to **4**) to use when calculating the table in the Decimal Places field.

      Note: The number entered here is <u>not</u> the number of the decimal places that will automatically be displayed on the table, as the table defaults to show **2** decimal places unless a greater number is entered here and the amount in the cell contains a value with that number of decimals. For example, if **0** is entered in this field,

the system will calculate the amounts using **0** decimals, but the table will display the amounts with **2** decimal places (the decimals will be all zeros since decimal places were <u>not</u> calculated); or if **4** is entered in this field, the system will calculate the amounts using **4** decimals, but the table will only display the amounts with **4** decimal places if the amount contains **4** decimals (otherwise, **2** (or **3**, if applicable) decimal places will show on the table).

Diagram C

g. Enter the appropriate option for how to calculate the table (**Base**, **First Step in Lane**, or **Previous**) in the Salary Calculation Type field, or click the **down-arrow** button to select the correct one. To calculate the amounts on the table as a percentage, and additional dollar amount if applicable, of the base (as specified in the Base field for the range), enter **Base**. To calculate the amounts on the table as a percentage, and additional dollar amount if applicable, of the amount in the first step for the lane, enter **First Step in Lane**. To calculate the amounts on the table as a percentage, and additional dollar amount if applicable, of the amount in the previous step in the lane, enter **Previous**.

h. If applicable, repeat these steps until the calculate options for all the ranges have been entered.

   Note: If needed, to remove the calculate options for a range, click the **Delete** button located to the left of the desired line in the Salary Schedule - Amounts Recalculate Options List; when prompted to delete the record, click **Yes**.

6. Click the **Execute** button to build the table as specified, or click the **Save** button to save the changes and wait to calculate the table at a later time.

7. After building the table, click the **Salary Schedules** tab and then the **Salary Schedule - Amounts** tab located on the bottom of the screen to view the table. See **Diagram D**.

8. Once the table has been built successfully, lock the table to prevent it from being accidentally recalculated.

Diagram D

Building (Recalculating) an FTE - Hours Table:

1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to build the new FTE - Hours table in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Click the **Recalculate** tab.

4. Click the **FTE - Hours** tab.

   Note: If the table is locked, the tab will be disabled; if needed, unlock the table.

5. Select the Reset Employee Steps and Lanes field to have the system adjust the employees with steps and/or lanes that are <u>not</u> within the dimensions of the salary schedule for calculation purposes (for example, adjust steps that are beyond the maximum step for a particular lane, or adjust lanes to Lane 1 if no lane was specified). A checkmark will appear in the box if the field is selected. See **Diagram E**.

Diagram E

Note: If the step and/or lane is adjusted for an employee, the step and lane entered in the Employee File for the particular pay code will not be updated, but the adjusted step and lane will be used in the calculations for the package and reflected in the Employee Negotiation Rates option for the employee. Then when completing the Update Payroll with Packages option, the steps in the Employee File can be updated at that time to the steps and lanes used in the calculations, if desired.

Tip: When building the FTE - Hours table the first time for a package, do not select this field so that employees with steps and/or lanes that are not within the dimensions of the salary schedule can be verified (and not included in the calculations for a package by mistake); then after building the table the first time, the table can be recalculated with the field selected in order to adjust the appropriate employees.

6. If the Negotiation Lanes option has been completed in Human Resources for the specified package, the Update Lanes from Human Resources field is enabled. If applicable, select the Update Lanes from Human Resources field to have the system place the employees in the appropriate lanes based on their education and/or position titles, rather than use the number of the lane entered in the Employee File. A checkmark will appear in the box if the field is selected.

    Note: If an employee would happen to match multiple lanes based on the criteria entered in the Negotiation Lanes option, the employee is placed in the *greatest* lane.

7. If the Update Lanes from Human Resources field is selected, the Post Lane Changes to Payroll field is enabled. If applicable, select the Post Lane Changes to Payroll field to update the number in the Lane field entered in the Employee File for the appropriate pay code with the number of the lane in which the employee is placed when building the FTE - Hours table. A checkmark will appear in the box if the field is selected.

8. Click the **Execute** button to build the table as specified, or click the **Save** button to save the changes and wait to calculate the table at a later time.

    Note: If the Reset Employee Steps and Lanes field was not selected and there are employees with steps and/or lanes that are not within the dimensions of the salary schedule, a message appears stating the number of employees that were not included in the table. To view a list of the employees that were not included, click **Yes**. If there are employees on the list that should be included in the calculation for the package, edit the record for the employee (double-click an employee on the list to open the record in the Employee File) and change the step and lane, if needed; then recalculate the FTE - Hours table. If there are employees on the list that should not be included in the calculation for the package, either delete the applicable year's pay code for the employee or change the pay group for the employee so it is not tied to the package; then recalculate the FTE - Hours table.

9. After building the table, click the **Salary Schedules** tab and then the **FTE - Hours** tab located on the bottom of the screen to view the table. See **Diagram F**.

10. Once the table has been built successfully, lock the table to prevent it from being accidentally recalculated.

Diagram F

Building (Recalculating) a Salary Totals Table:

1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to build the new Salary Totals table in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Click the **Recalculate** tab.

4. Click the **Salary Totals** tab.

   Note: If the table is locked, the tab will be disabled; if needed, unlock the table.

5. Complete the Salary Totals Recalculate Options List to define the options for calculating the table. If the calculations on the table are consistent throughout, only enter one line using the dimensions for the entire package; otherwise, multiple ranges of cells (steps and lanes) can be entered with different options stipulated, if needed. To enter the calculate options for a range, complete the following:

   a. In the blank line (indicated with an asterisk) at the bottom of the Salary Totals Recalculate Options List, enter the number of the first step to calculate in the Starting Step field, or click the **down-arrow** button to select the correct one. See **Diagram G**.

   b. Enter the number of the last step to calculate in the Ending Step field, or click the **down-arrow** button to select the correct one.

   c. Enter the number of the first lane to calculate in the Starting Lane field, or click the **down-arrow** button to select the correct one.

   d. Enter the number of the last lane to calculate in the Ending Lane field, or click the **down-arrow** button to select the correct one.

Diagram G

   e. Enter the number of decimal places (**0** to **4**) to use when calculating the table in the Decimal Places field.

   Note: The number entered here is not the number of the decimal places that will automatically be displayed on the table, as the table defaults to show **2** decimal places unless a greater number is entered here and the amount in the cell contains a value with that number of decimals. For example, if **0** is entered in this field, the system will calculate the amounts using **0** decimals, but the table will display the amounts with **2** decimal places (the decimals will be all zeros since decimal places were not calculated); or if **4** is entered in this field, the system will calculate the amounts using **4** decimals, but the table will only display the amounts with **4** decimal places if the amount contains **4** decimals (otherwise, **2** (or **3**, if applicable) decimal places will show on the table).

   f. If the employees included in the specified range are to be paid a percent increase from their previous year's wages (and not use the amounts on the Salary Schedule - Amounts table), enter the percentage for the increase in the Percent Increase field. The percentage can be up to **12** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable. If a percent increase from the prior year's wages will not used, enter a **0** in this field or leave it blank.

   Note: The Percent Increase field is disabled if the package is defined with **Extracurricular** specified as the Package Type.

g. If the employees included in the specified range are to be paid a fixed dollar increase from their previous year's wages (and <u>not</u> use the amounts on the Salary Schedule - Amounts table), enter the dollar amount for the increase in the Dollar Increase field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable. If a fixed dollar increase from the prior year's wages will <u>not</u> used, enter a **0** in this field or leave it <u>blank</u>.

   Note: The Dollar Increase field is disabled if the package is defined with **Extracurricular** specified as the Package Type.

h. If applicable, enter the fixed dollar amount to be paid for each additional day the employees are contracted to work beyond the regular number of days in the Dollars Per Additional Day field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

   Note: The Dollars Per Additional Day field is disabled if the package is defined with **Extracurricular** specified as the Package Type.

i. If applicable, enter the extra dollar amount paid for each additional degree hour earned for the employees (as entered in the Additional Degree Hours field on the Wages screen in the Employee File for the applicable pay code) in the Dollars Per Additional Degree Hour field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

   Note: The Dollars Per Additional Degree Hour field is disabled if the package is defined with **Extracurricular** specified as the Package Type.

j. If applicable, select the Use Daily Rate For Additional Days field to use the individual daily rates (the Absence Per Day rate calculated for an employee's contract) as the amount to be paid for each additional day the employees are contracted to work beyond the regular number of days. A checkmark will appear in the box if the field is selected.

   Note: If the Use Daily Rate For Additional Days field is selected, the Dollars Per Additional Day field should be <u>blank</u>. The Use Daily Rate For Additional Days field is disabled if the package is defined with **Extracurricular** specified as the Package Type.

k. If the package is defined with **Extracurricular** specified as the Package Type, the Total Salary Calculation Type field is enabled. Enter the appropriate option for how to calculate the table (**Percent of Actual**, **Percent of Main Package**, or **Salary Table**) in the Total Salary Calculation Type field, or click the **down-arrow** button to select the correct one. To calculate the amounts on the table as a percentage of each employee's total wages (total includes all additional dollars on the main contract) in the main package, enter **Percent of Actual**. To calculate the amounts on the table as a percentage of the dollar amount for each employee's particular step and lane on the Salary Schedule - Amounts table of the main package, enter **Percent of Main Package**. To calculate the amounts on the table based on the Salary Schedule - Amounts table created for the package, enter **Salary Table**.

l. If applicable, repeat these steps until the calculate options for all the ranges have been entered.

   Note: If needed, to remove the calculate options for a range, click the **Delete** button located to the left of the desired line in the Salary Totals Recalculate Options List; when prompted to delete the record, click **Yes**.

6. Click the **Execute** button to build the table as specified, or click the **Save** button to save the changes and wait to calculate the table at a later time.

7. After building the table, click the **Salary Schedules** tab and then the **Salary Totals** tab located on the bottom of the screen to view the table. See **Diagram H**.

8. Once the table has been built successfully, lock the table to prevent it from being accidentally recalculated.

Diagram H

Building (Recalculating) a Benefit Totals Table:

Note: Building the Benefit Totals table uses a quick calculation to determine the benefits (deductions and taxes) paid by the employer for the employees in the package, and it does not take in account if there are employees set up with deductions to be withheld or expensed during different week numbers; if a more detailed calculation is needed, complete the Calculate Budget option to determine the exact amounts using the appropriate week numbers. If the Calculate Budget option is completed *after* building the Benefit Totals table, the table will be updated with the figures from the Calculate Budget option.

1. From the Negotiations screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to build the new Benefit Totals table in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Click the **Recalculate** tab.

4. Click the **Benefit Totals** tab.

    Note: If the table is locked, the tab will be disabled; if needed, unlock the table.

5. Enter the number of times the employees will be paid next year in the Pay Periods Per Year field, or leave this field blank to use the number entered in the Total Payments field on the Wages screen of the Employee File for each employee. The number can be up to **2** digits long. See **Diagram I**.
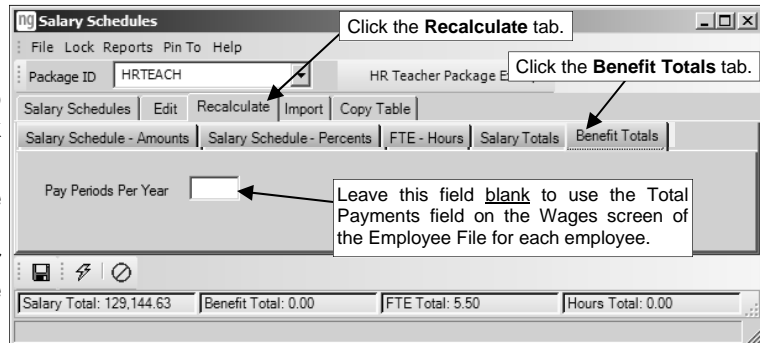

Diagram I

6. Click the **Execute** button to build the table as specified, or click the **Save** button to save the changes and wait to calculate the table at a later time.

7. After building the table, click the **Salary Schedules** tab and then the **Benefit Totals** tab located on the bottom of the screen to view the table. See **Diagram J**.

8. Once the table has been built successfully, lock the table to prevent it from being accidentally recalculated.

Diagram J

Locking a Table:

Note: A table that is "locked" cannot be recalculated, but can still be manually edited, if desired. A checkmark will appear in front of the table under the **Lock** menu if it is locked.

1. From the **Negotiations** screen, select the **Maintenance** menu and then **Salary Schedules**.

2. At the Salary Schedules screen, enter the ID of the package for which to lock the table in the Package ID field, or click the **down-arrow** button to select the correct one.

3. Select the **Lock** menu and then the desired table to lock.

4. To confirm the desired table is locked, select the **Lock** menu and verify that a checkmark appears in front of the table name.

5. The locked table will be disabled on the **Recalculate** tab in the Salary Schedules option.

   Note: If all the tables in a package are locked, the **Recalculate** tab in the Salary Schedules option will be disabled.

Employee Negotiation Rates

The Employee Negotiation Rates option is used in Negotiations to track the employees included in a package, along with their pay codes, step and lane, and salary totals for the specified package. The deductions and taxes tied to the specified pay code for each employee are also tracked in the Employee Negotiation Rates option and show the amount withheld (paid by the employee) and the amount expensed (paid by the employer) for each deduction and tax.

The Employee Negotiation Rates option is intended to be used as a reference or "look up" table. The only fields of information that can be changed within the Employee Negotiation Rates option are the Step and Lane fields. Nebraska school districts will use the Employee Negotiation Rates option when comparing packages with neighboring school districts with dissimilar salary schedule dimensions in order to place the employees in the appropriate steps and lanes for the specified package (salary schedules).

Editing Employee Negotiation Rates:

Note: Employees only appear in the Employee Negotiation Rates option for a package after building the FTE - Hours table.

1. From the Negotiations screen, select the **Maintenance** menu and then **Employee Negotiation Rates**.
2. At the Employee Negotiation Rates screen, enter the ID of the package for which to edit the information in the Package ID field, or click the **down-arrow** button to select the correct one. See **Diagram A**.

Diagram A

3. The employees included in the selected package will appear on the **Package** tab (screen) in the Employee Negotiation Rates List located in the lower left corner of the screen.
4. Enter the ID of the employee to view or edit in the Employee ID field, or click the **down-arrow** button to select the correct one. An employee can also be selected by double-clicking on the desired employee on the **Package** tab (screen) in the Employee Negotiation Rates List.

    Note: To view all the packages for which the specified employee is included, click the **Employee** tab in the Employee Negotiation Rates List. To then view all the employees in the selected package, click the **Package** tab.

5. If needed, enter the ID of the pay code to view or edit for the specified employee in the Pay Code ID field, or click the **down-arrow** button to select the correct one.

6. If applicable, the total salary amount calculated for the specified pay code for the employee in the particular package appears in the Total Amount field. The amount in this field <u>cannot</u> be changed.

    Note: Amounts only appear in the field for employees once the Salary Totals table has been built for the package.

7. If applicable, the pay rate calculated for the specified pay code for the employee in the particular package appears in the Pay Rate field. The amount in this field <u>cannot</u> be changed.

    Note: Amounts only appear in the field for employees once the Salary Totals table has been built for the package.

8. The step for which the employee is currently being calculated for the specified package and pay code appears in the Step field. If needed, change the number for the step for the pay code for the employee, and then recalculate the FTE - Hours, Salary Totals, and Benefit Totals tables.

    Note: If the step is changed for the employee in this field, the step entered in the Employee File for the particular pay code will <u>not</u> be updated. If desired, when completing the Update Payroll with Packages option, the steps in the Employee File can be updated at that time to the steps (and lanes) shown here in the Employee Negotiation Rates option.

9. The lane for which the employee is currently being calculated for the specified package and pay code appears in the Lane field. If needed, change the number of the lane for the pay code for the employee, and then recalculate the FTE - Hours, Salary Totals, and Benefit Totals tables.

    Note: If the lane is changed for the employee in this field, the lane entered in the Employee File for the particular pay code will <u>not</u> be updated. If desired, when completing the Update Payroll with Packages option, the lanes in the Employee File can be updated at that time to the lanes (and steps) shown here in the Employee Negotiation Rates option.

10. The deductions and taxes tied to the specified pay code for the employee appear in the Employee Deductions List on the right side of the screen. The amount withheld (paid by the employee) and the amount expensed (paid by the employer) are shown for each deduction and tax, along with the totals for the amounts paid by the employee and the employer.

    Note: The deductions and taxes only appear for employees once the Benefit Totals table has been built for the package.

11. If changes were made, click the **Save** button.

12. If desired, to delete the calculations for the employee's pay code from the package, click the **Delete** button; then when prompted, click **Yes** to delete the record.

    Note: Deleting the employee's calculations within the Employee Negotiation Rates option does <u>not</u> update the totals on the salary schedules for the package; to update the totals on the salary schedules, make the necessary changes in the Employee File for the employee and then recalculate the FTE - Hours, Salary Totals, and Benefit Totals tables for the package.

    Tip: To delete the calculations for all the employees in the package, complete the Delete Package Rates option.

13. Repeat the steps until all of the employees have been edited.

Calculate Budget

The Calculate Budget option in Negotiations is used to create a budget batch for a selected package. The Calculate Budget option completes a detailed calculation for all the payrolls for the entire year, using the salary amounts for the specified package and the deductions defined for each employee. With the Calculate Budget option, the total salary and benefits for each line item for the package are added as entries in a budget batch, using the Budgets option in General Ledger (or also accessed under the Options menu in Negotiations). Once the calculation is complete, the budget batch created for the package can be edited and posted.

Note: The Calculate Budget option updates the amounts on the Benefit Totals table.

Calculating Budget:

1. From the Negotiations screen, select the **Options** menu and then **Calculate Budget**.

2. If a batch already exists, the Calculate Budget Batch Search screen will appear. To recalculate an existing budget batch, select the desired batch by double-clicking on the batch description; otherwise, to calculate a new batch, click the **New Record** button. If a batch does <u>not</u> exist, the Calculate Budget screen will appear immediately in order to create a new batch.

3. Enter a unique description for the new batch in the Calculate Budget Batch Description field. The description can be alphanumeric and up to **50** characters long. Leave the field <u>blank</u> to use a default description assigned by the system. See **Diagram A**.

Diagram A

4. Enter the description of the budget batch for which to add the budget entries from the calculation in the Budget Batch Description field, or click the **down-arrow** button to select the correct one. To create a new budget batch, press the **Ctrl+F** keys and then click the **New Record** button on the Budget Batch Description Search screen.

    Note: Only budget batches which are <u>not</u> tied to a different Calculate Budget batch can be entered in this field. If an existing budget batch which already contains budget entries is selected, the existing entries will be deleted during this calculation; only the new budget entries for the salaries and benefits will then be included in the batch.

5. Enter the ID of the package for which to calculate the budget in the Package ID field, or click the **down-arrow** button to select the correct one.

6. Enter the **4-digit** year for which tax rates to use when calculating the budget in the Tax Year field. Leave this field <u>blank</u> to default to the current year (as based on the computer date). Typically, the next calendar year is entered in this field.

7. Enter the appropriate pay period (frequency) for which deductions to include in the first calculation in the Week Number for Deductions field, or click the **down-arrow** button to select the correct one. For example, to include only those deductions defined with amounts for Every Pay Period in the first calculation, enter **Every Pay Period**; or to include those deductions defined with amounts for Every Pay Period and those with amounts for a specific week (used if there are multiple payrolls in one

month and deductions are only withheld and expensed on a specific week), enter the appropriate week number, such as **Week 1**, **Week 2**, etc. Leave the field <u>blank</u> to default to **Every Pay Period**.

8. If deductions are to be withheld and expensed for only specific weeks (a week number was entered in the Week Number for Deductions field), complete the Deduction Week Numbers List in order to enter the week numbers for <u>all</u> pay periods for the entire year. To add an entry, complete the following in the blank line (indicated with an asterisk) at the bottom of the Deduction Week Numbers List:

    a. Enter the number of the date sequence for the entry in the Date Sequence field (for example, enter **1** as the Date Sequence for the first entry, **2** for the second entry, **3** for the third entry, etc.).

    b. Enter the appropriate pay period (frequency) for which deductions to include in the calculation for the specified Date Sequence in the Week Number for Deductions field, or click the **down-arrow** button to select the correct one. For example, to include those deductions defined with amounts for Every Pay Period, enter **Every Pay Period**; or to include those deductions defined with amounts for a specific week (used if there are multiple payrolls in one month and deductions are only withheld and expensed on a specific week), enter the appropriate week number, such as **Week 1**, **Week 2**, etc.

    Note: To remove an entry from the Deduction Week Numbers List, click the **Delete** button to the left of the desired entry; when prompted to delete the line, click **Yes**.

9. Click the **Save** button.

10. Click the **Execute** button.

11. When prompted, click **Yes** to continue calculating.

12. After the calculation is complete, a message will appear; click **OK** to view the Payroll Messages listing the number of employees calculated and any errors that were found.

    Note: If any errors are found during the payroll calculation, the errors must be corrected and the batch recalculated before continuing.

13. If desired, to print payroll reports for the budget calculation batch, select the **Payroll** menu on the Negotiations screen, **Reports**, and then the desired report.

14. If needed, edit the budget batch by selecting the **Options** menu on the Negotiations screen and then **Budgets**.

Update Payroll with Packages

The Update Payroll with Packages option in Negotiations is used after a settlement has been reached to update the desired packages and post the new employee wages to the Employee File in Payroll. With the Update Payroll with Packages option, the rates in the Deduction File can also be updated with the new rates entered for the upcoming year, if desired. If needed, the Update Payroll for Packages option can calculate retroactive pay if the school district had to start paying employees using the previous year's amounts because a settlement had <u>not</u> been reached prior to the first payroll of the new year. For packages defined with **Unit** as the Package Type, the Update Payroll with Packages option can also calculate and update the rate for overtime pay codes for the new year, and contracts can be created based on the new unit rate and totals hours, if applicable.

<u>Updating Payroll with Packages</u>:

<u>Note</u>: As a precaution, make a current backup before completing the Update Payroll with Packages option.

1. From the Negotiations screen, select the **Options** menu and then **Update Payroll with Packages**.
2. At the Update Payroll with Packages screen, enter the ID of the package to update in the Package ID field, or click the **down-arrow** button to select the correct one
3. Select the Update Step/Lane field to update the numbers in the Step and Lane fields in the Employee File for the applicable pay codes with the steps and lanes used in the calculations of the salary schedules. A checkmark will appear in the box if the field is selected. See **Diagram A**.
4. If updating a package defined with **Unit** as the Package Type, the Update Overtime Pay Codes field is enabled. Select the Update Overtime Pay Codes field to have the system automatically calculate the overtime rates and update the appropriate pay codes for overtime for the new year. A checkmark will appear in the box if the field is selected.

   <u>Note</u>: In order to update the overtime rates, the unit pay codes tied to the specified package must have the Overtime Pay Code ID field completed in the Pay Code File, and the overtime pay codes must have already been created for the new year.
5. If the Deduction Rates option had been completed for the specified package, the Update Deductions field is enabled. Select the Update Deductions field to update the rate tables in the Deduction File for the deductions with the new rates entered for the upcoming year in the Deduction Rates option. A checkmark will appear in the box if the field is selected.

Diagram A

6. If the school district had to start paying employees using the previous year's amounts because a settlement had <u>not</u> been reached prior to the first payroll of the new year, select the Calculate Retroactive Pay field to calculate the retroactive pay based on the new wages and the wages paid so far this fiscal year. A checkmark will appear in the box if the field is selected.

    Note: If this field is selected, the system will create entries in a pay period entries batch taking the difference of the pay rate for the new wages less the pay rate of the previously paid wages multiplied by the number of payments (for contract pay codes) or the number of units (for unit pay codes). Only one entry will be created for each contract pay code (and absence on contract, if applicable) per employee with the amount (difference) in the Dollars field and the Units, Hours, and Pay Rate fields <u>blank</u>. For the unit pay codes, one entry for each pay code per employee will be created with the Units, Pay Rate, and Dollars fields completed and the Hours field <u>blank</u>. Only pay codes tied to the specified package (along with overtime pay codes or those defined to use the same rate as the primary pay code) and were in the Employee File at the time of the original payroll calculation will have the retroactive pay calculated. The retroactive pay entries <u>cannot</u> be created if there is a payroll calculation batch that is unposted.

7. If updating a package defined with **Unit** as the Package Type, the Create Contracts from Unit Package field is enabled. Select the Create Contracts from Unit Package field to have the system automatically create contracts based on the new unit rate and totals hours of the unit pay codes tied to the specified package. A checkmark will appear in the box if the field is selected.

8. Enter the date the new wages (applicable for contract pay codes only) will start being paid in the Wages Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. To use the Start Date currently set up for the wages, leave this field <u>blank</u>.

9. If the Update Deductions field is selected, the Deduction Start Date field is enabled. Enter the date the new deduction rates will take effect in the Deduction Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. To update the rate tables in the Deduction File immediately, leave this field <u>blank</u>.

10. If the Create Contracts from Unit Package field is selected, the Pay Codes List is enabled. All the unit pay codes tied to the specified package appear in the Pay Codes List. For each unit pay code, complete the following:

    a. Enter the ID of the contract pay code to use when creating the contracts in the Contract Pay Code ID field, or click the **down-arrow** button to select the correct one.

    b. Enter the number of times the employees will get paid with the contracts in the Total Payments field.

    c. If the contract pay code already exists for the specified year for employees, select the Overwrite Existing Wages field to replace the existing wages with the newly created wages. A checkmark will appear in the box if the field is selected.

    d. If applicable, repeat these steps until all the pay codes have been completed.

        Note: If needed, to remove a pay code from the list so that contracts are <u>not</u> created for it, click the **Delete** button located to the left of the desired line in the Pay Codes List; when prompted to delete the record, click **Yes**.

11. Click the **Execute** button.

12. The system will prompt to verify if you want to continue updating; click **Yes**.

13. If the wages to be updated already exist, a message will appear prompting to skip or overwrite the existing wages. Click the **Skip** button to continue updating the package but <u>not</u> update the wages that already exist, click the **Overwrite** button to continue updating the package and replace the existing wages with the new wages, or click the **Cancel** button to cancel updating the package and return to the Update Payroll with Packages screen.

14. If the Calculate Retroactive Pay field was selected, the system will prompt for the batch for which to post the retroactive pay entries. When prompted, complete the batch options to create a new batch for which to post the entries, or double-click an existing batch if the search screen appears (or click the **New Record** button on the search screen to create a new batch).

15. After the update is complete, the system will display a message in the status bar.

Contracts (Printing with Mail Merge)

Contracts can be printed using the Export Pay Codes for Mail Merge option in Negotiations and the mail merge function in a Microsoft® Word document. Before completing the Export Pay Codes Mail Merge option and printing the contracts, the package must be updated using the Update Payroll with Packages option. There are two contract templates provided by Software Unlimited, Inc., for your use. Below are examples of the two templates.

Template 1:

MISSOURI SCHOOL DISTRICT

100 CHERRY LANE
ANYWHERE, MO 54777

EMPLOYMENT CONTRACT

Replace this paragraph with your own wording for employment contracts. This document will merge the "main" teaching contract into the area below. You can also setup various logic to change the wording as needed for your district.

This contract is between the school district and:

DALE GREEN
8675 JACKSON BLVD
SOMEPLACE, NE 68500
SS Number: **483-62-7362**

For fiscal year ending 2002, beginning September 1, 2001:

Contract Description: **JH SOC TCH**
Lane: **5 / [5] MA+18**
Step: **6 / [6] STEP 5**
FTE: **1.0**
Contract Days: **192**
Contract Amount: $**30640.00**
Total Payments: **12**
Amount Per Pay Period: $**2553.33**

Signed:

_____   Date: _____
DALE GREEN

_____   Date: _____
SUPERINTENDENT

Template 2:

MISSOURI SCHOOL DISTRICT
100 CHERRY LANE
ANYWHERE, MO 54777

EMPLOYMENT CONTRACT

Replace this paragraph with your own wording for employment contracts. This document will merge the "main" teaching contract into the area below. You can also setup various logic to change the wording as needed for your district.

This contract is between the school district and:

DALE GREEN
8675 JACKSON BLVD
SOMEPLACE, SD 57490
SS Number: **483-62-7362**

For fiscal year ending 2002, beginning September 1, 2001:

Contract(s) Signed:	Lane	Step	Amount
TEACHING	[4] BA+10	[3] 3RD YEAR	$ 29,555.45
FB COACH	[10] VAR COACH	[3] 3RD YEAR	$ 3,000.00
		TOTAL FOR ALL CONTRACTS:	$ 32,555.45

_____ Date: _____
DALE GREEN

_____ Date: _____
SUPERINTENDENT

Export Pay Codes for Mail Merge:

The Export Pay Codes for Mail Merge option in Negotiations creates a file of pay code information that can be merged with a Microsoft® Word document in order to print contracts for employees in a package.

Note: Before completing the Export Pay Codes for Mail Merge option, the package must be updated using the Update Payroll with Packages option.

1. From the Negotiations screen, select the **Options** menu and then **Export Pay Codes for Mail Merge**.

2. At the Export Pay Codes for Mail Merge screen, enter the correct path (drive and folders) and file name for the file to create during the export in the File Name field, or click the **Search** button to select the correct path and specify the file name. By default, the file name will be **Contract.txt**.

3. Enter the **4-digit** year of the ending fiscal year for the pay codes to export in the Fiscal Year End field. The year entered in the Negotiation Year End field in the Negotiations System File will appear as the default, but can be changed. See **Diagram A**.

Diagram A

4. Enter the maximum number of pay codes (up to **2** digits) to export for each employee in the Maximum Employee Pay Codes Exported field.

5. All the custom fields defined in Payroll (and Human Resources, if applicable) appear in the Custom Field Selection List. Specify the custom fields to include in the export file by clicking the box under the Selected column to the left of each desired custom field. A checkmark will appear in the box if the custom field is selected. To select all the custom fields, click the **Select All** button located above the Custom Field Selection List. If desired, change the filters to modify the custom fields displayed here.

6. All the pay codes defined in Payroll appear in the Pay Code Selection List. Specify the pay codes to include in the export file by clicking the box under the Selected column to the left of each desired pay code. A checkmark will appear in the box if the pay code is selected. To select all the pay codes, click the **Select All** button located above the Pay Code Selection List. If desired, change the filters to modify the pay codes displayed here.

7. All the employees appear in the Employee Selection List. Specify the employees to include in the export file by clicking the box under the Selected column to the left of each desired employee. A checkmark will appear in the box if the employee is selected. To select all the employees, click the **Select All** button located above the Employee Selection List.

8. Click the **Execute** button to continue the export.

9. After the pay codes are exported to a file, a message will appear in the status bar.

10. If using the templates provided by Software Unlimited, Inc., copy the two files (templates) to a location on your hard drive at this time.

11. Access Microsoft® Word and then open the desired contract template.

12. If using *Template1* or *Template2* (provided by Software Unlimited, Inc.), a message will appear stating the data source was not found; click the **Find Data Source** button.

    Note: Depending on which version of Microsoft® Word is installed on your computer, additional prompts may appear prior to the one noted above confirming the file is a mail merge document (click **Yes**) and/or showing an open database connectivity error (click **OK**).

13. At the Open Data Source screen, select the correct path (drive and folders) of the **Contract.txt** file. Once the correct path has been selected, select the **Contract.txt** file and then click **Open**.

    Tip: You may have to change the Files of Type field to look for **Text Files (*.txt)** or **All Files (*.*)**.

    Note: If the document is saved after completing this step, the system will try to locate the data source in that same location the next time the document is opened. If the data source is not found at that specified location when the document is opened, an error message will appear. For example, if you pointed to the **Contract.txt** file on a floppy diskette in **Drive A** in the previous step and then saved the document, the next time this document is opened, the system will look for the data file (**Contract.txt**) in **Drive A**; an error message will appear if there is not a diskette in **Drive A** containing the **Contract.txt** file.

14. Complete the appropriate steps depending upon which version of Microsoft® Word is being used.

    Word 2000:
    - Select the **Tools** menu and then **Mail Merge**.
    - The path and file name of the source document appear under the **Get Data** button. If this is not the correct path, click the **Get Data** button and then **Open Data Source** to select the correct path and file name.
    - Click the **Merge** button.
    - Make your selections (for example, to merge to a new document or the printer) and then click **Merge**.
    - If the files were merged to the printer, the contracts will print directly to the default printer.
    - If the files were merged to a new document, the new document will be created and will display the first employee's contract (the first page of the new document) on the screen. The contracts can then be printed like a normal word processing document.

    Word 2002/2003:
    - The mail merged document will open showing the first employee's contract (the first page of the document) on the screen. The contracts can then be printed like a normal word processing document.
    - If desired, to access the regular mail merge options, select the **Tools** menu, **Letters and Mailings**, and then **Mail Merge**.

    Word 2007/2010:
    - The mail merged document will open showing the first employee's contract (the first page of the document) on the screen. The contracts can then be printed like a normal word processing document.
    - If desired, to access the regular mail merge options, select the **Mailings** tab, **Start Mail Merge**, and then **Step by Step Mail Merge Wizard**.

    Note: For additional information on the mail merge function, contact your Technology Coordinator or Business Education Teacher.

MISCELLANEOUS

Salary Schedule Examples

Example 1:

This is an example of a *diagonal* salary schedule with a Maximum Step of **12** and Maximum Lane of **7**. The starting step in this example is **Step 1**. The salary schedule has a *step percent increment* of **4%** and a *lane percent increment* of **5%**. The **Lane 1, Step 6 cell** and the **Lane 2, Step 7 cell** were closed manually. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built (recalculated) by selecting to calculate on **Base** with **$20,500** as the base. Two decimal places were used as the default in this salary schedule. See **Diagrams A, B, C, and D**.

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
Salary Schedule - Percents Recalculate Options											
▶ ✕	1	12	1	7	4.00	5.00	2			☐	☐
✱ ✕										☑	☑

Diagram A

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
Salary Schedule - Amounts Recalculate Options							
▶ ✕	1	12	1	7	20,500.00	2	Base
✱ ✕							

Diagram B

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}	{ 7}
{ 1}	100.00%	105.00%	110.00%	115.00%	120.00%	125.00%	130.00%
{ 2}	104.00%	109.00%	114.00%	119.00%	124.00%	129.00%	134.00%
{ 3}	108.00%	113.00%	118.00%	123.00%	128.00%	133.00%	138.00%
{ 4}	112.00%	117.00%	122.00%	127.00%	132.00%	137.00%	142.00%
{ 5}	116.00%	121.00%	126.00%	131.00%	136.00%	141.00%	146.00%
{ 6}		125.00%	130.00%	135.00%	140.00%	145.00%	150.00%
{ 7}			134.00%	139.00%	144.00%	149.00%	154.00%
{ 8}			138.00%	143.00%	148.00%	153.00%	158.00%
{ 9}				147.00%	152.00%	157.00%	162.00%
{ 10}				156.00%	161.00%	166.00%
{ 11}					165.00%	170.00%
{ 12}						174.00%

Diagram C

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}	{ 7}
{ 1}	20,500.00	21,525.00	22,550.00	23,575.00	24,600.00	25,625.00	26,650.00
{ 2}	21,320.00	22,345.00	23,370.00	24,395.00	25,420.00	26,445.00	27,470.00
{ 3}	22,140.00	23,165.00	24,190.00	25,215.00	26,240.00	27,265.00	28,290.00
{ 4}	22,960.00	23,985.00	25,010.00	26,035.00	27,060.00	28,085.00	29,110.00
{ 5}	23,780.00	24,805.00	25,830.00	26,855.00	27,880.00	28,905.00	29,930.00
{ 6}		25,625.00	26,650.00	27,675.00	28,700.00	29,725.00	30,750.00
{ 7}			27,470.00	28,495.00	29,520.00	30,545.00	31,570.00
{ 8}			28,290.00	29,315.00	30,340.00	31,365.00	32,390.00
{ 9}				30,135.00	31,160.00	32,185.00	33,210.00
{ 10}				31,980.00	33,005.00	34,030.00
{ 11}					33,825.00	34,850.00
{ 12}						35,670.00

Diagram D

Example 2:

This is an example of a salary schedule with a Maximum Step of **7** and Maximum Lane of **5**. The starting step in this example is **Step 0**. The salary schedule has a *step dollar increment* of **$700** and a *lane dollar increment* of **$500**. When building the Salary Schedule - Percents table, the Geometric Progression field was selected. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Previous** (the previous step in each lane). Two decimal places were used in this salary schedule. See **Diagrams E, F, G, and H**.

		Starting Step △	Ending Step △	Starting Lane △	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶	X	0	7	1	5			2	700.00	500.00	☐	☑
*	X										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram E

		Starting Step △	Ending Step △	Starting Lane △	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶	X	0	7	1	5	22,000.00	2	Previous
*	X							

Salary Schedule - Amounts Recalculate Options

Diagram F

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}
{ 0}	100.00%	100.00% $500.00	100.00% $1,000.00	100.00% $1,500.00	100.00% $2,000.00
{ 1}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 2}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 3}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 4}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 5}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 6}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00
{ 7}	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00	100.00% $700.00

Diagram G

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}
{ 0}	22,000.00	22,500.00	23,000.00	23,500.00	24,000.00
{ 1}	22,700.00	23,200.00	23,700.00	24,200.00	24,700.00
{ 2}	23,400.00	23,900.00	24,400.00	24,900.00	25,400.00
{ 3}	24,100.00	24,600.00	25,100.00	25,600.00	26,100.00
{ 4}	24,800.00	25,300.00	25,800.00	26,300.00	26,800.00
{ 5}	25,500.00	26,000.00	26,500.00	27,000.00	27,500.00
{ 6}	26,200.00	26,700.00	27,200.00	27,700.00	28,200.00
{ 7}	26,900.00	27,400.00	27,900.00	28,400.00	28,900.00

Diagram H

Example 3:

This is an example of a *diagonal* salary schedule with a Maximum Step of **12** and Maximum Lane of **7**. The starting step in this example is **Step 1**. The salary schedule has a *step percent increment* of **3%** and a *lane percent increment* of **4%**. The Geometric Progression field was also selected when building the Salary Schedule - Percents table to calculate a percent of the previous step and lane rather than a percent of the base. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** with **$20,000** as the base. Two decimal places were used as the default in this salary schedule. See **Diagrams I, J, K, and L**.

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
Salary Schedule - Percents Recalculate Options											
▶ X	1	12	1	7	3.00	4.00	2			☐	☑
* X										☑	☑

Diagram I

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
Salary Schedule - Amounts Recalculate Options							
▶ X	1	12	1	7	20,000.00	2	Base
* X							

Diagram J

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}	{ 7}
{ 1}	100.00%	104.00%	108.16%	112.49%	116.99%	121.67%	126.54%
{ 2}	103.00%	107.12%	111.40%	115.86%	120.50%	125.32%	130.34%
{ 3}	106.09%	110.33%	114.74%	119.34%	124.12%	129.08%	134.25%
{ 4}	109.27%	113.64%	118.18%	122.92%	127.84%	132.95%	138.28%
{ 5}	112.55%	117.05%	121.73%	126.61%	131.68%	136.94%	142.43%
{ 6}	115.93%	120.56%	125.38%	130.41%	135.63%	141.05%	146.70%
{ 7}		124.18%	129.14%	134.32%	139.70%	145.28%	151.10%
{ 8}			133.01%	138.35%	143.89%	149.64%	155.63%
{ 9}			142.50%	148.21%	154.13%	160.30%
{ 10}				152.66%	158.75%	165.11%
{ 11}					163.51%	170.06%
{ 12}						175.16%

Diagram K

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}	{ 7}
{ 1}	20,000.00	20,800.00	21,632.00	22,498.00	23,398.00	24,334.00	25,308.00
{ 2}	20,600.00	21,424.00	22,280.00	23,172.00	24,100.00	25,064.00	26,068.00
{ 3}	21,218.00	22,066.00	22,948.00	23,868.00	24,824.00	25,816.00	26,850.00
{ 4}	21,854.00	22,728.00	23,636.00	24,584.00	25,568.00	26,590.00	27,656.00
{ 5}	22,510.00	23,410.00	24,346.00	25,322.00	26,336.00	27,388.00	28,486.00
{ 6}	23,186.00	24,112.00	25,076.00	26,082.00	27,126.00	28,210.00	29,340.00
{ 7}		24,836.00	25,828.00	26,864.00	27,940.00	29,056.00	30,220.00
{ 8}			26,602.00	27,670.00	28,778.00	29,928.00	31,126.00
{ 9}				28,500.00	29,642.00	30,826.00	32,060.00
{ 10}					30,532.00	31,750.00	33,022.00
{ 11}						32,702.00	34,012.00
{ 12}							35,032.00

Diagram L

Example 4:

This is an example of a salary schedule with a Maximum Step of **15** and Maximum Lane of **6**. The starting step in this example is **Step 1**. The salary schedule has a *step increment* of **3%** from *Step 1* to *Step 2* and then **4%** for all other steps. The *lane increment* is <u>not</u> consistent throughout the entire salary schedule. Ranges of cells (steps and lanes) were specified when recalculating the Salary Schedule - Percents table so that the different step and lane increments could be entered accordingly. This salary schedule is not a true diagonal but the step percent increments end in a diagonal fashion. For example, **Step 10, Lane 1** (with and a percent of **135%** of the base) is the last step in Lane 1 with a step percent increment; **135%** is also the percent of base for **Steps 11 to 15 for Lane 1**, but with an additional amount of **$300**. In **Lane 2**, the step percent increment stops after **Step 11** and **Lane 3 with Step 12** and so on. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** with a different base entered for each lane. Two decimal places were used in this salary schedule. See **Diagrams M, N, O, and P.**

		Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶	X	1	2	1	6	3.00	4.00	2			☐	☐
	X	3	11	1	1	4.00		2			☐	☐
	X	3	12	2	2	4.00		2			☐	☐
	X	3	13	3	3	4.00		2			☐	☐
	X	3	14	4	4	4.00		2			☐	☐
	X	3	15	5	5	4.00		2			☐	☐
	X	11	15	1	1	.00		2	300.00		☐	☐
	X	12	15	2	2	.00		2	775.00		☐	☐
	X	13	15	3	3	.00		2	800.00		☐	☐
	X	14	15	4	4	.00		2	825.00		☐	☐
	X	15	15	5	5	.00		2	860.00		☐	☐
*	X										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram M

		Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶	X	1	15	1	1	21,450.00	2	Base
	X	1	15	2	2	22,522.50	2	Base
	X	1	15	3	3	23,166.00	2	Base
	X	1	15	4	4	24,024.00	2	Base
	X	1	15	5	5	25,096.50	2	Base
	X	1	15	6	6	25,740.00	2	Base
*	X							

Salary Schedule - Amounts Recalculate Options

Diagram N

	Salary Schedule - Percents					
	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	100.00%	104.00%	108.00%	112.00%	116.00%	120.00%
{ 2}	103.00%	107.00%	111.00%	115.00%	119.00%	123.00%
{ 3}	107.00%	111.00%	115.00%	119.00%	123.00%	127.00%
{ 4}	111.00%	115.00%	119.00%	123.00%	127.00%	131.00%
{ 5}	115.00%	119.00%	123.00%	127.00%	131.00%	135.00%
{ 6}	119.00%	123.00%	127.00%	131.00%	135.00%	139.00%
{ 7}	123.00%	127.00%	131.00%	135.00%	139.00%	143.00%
{ 8}	127.00%	131.00%	135.00%	139.00%	143.00%	147.00%
{ 9}	131.00%	135.00%	139.00%	143.00%	147.00%	151.00%
{ 10}	135.00%	139.00%	143.00%	147.00%	151.00%	155.00%
{ 11}	135.00% $300.00	143.00%	147.00%	151.00%	155.00%	159.00%
{ 12}	135.00% $300.00	143.00% $775.00	151.00%	155.00%	159.00%	163.00%
{ 13}	135.00% $300.00	143.00% $775.00	151.00% $800.00	159.00%	163.00%	167.00%
{ 14}	135.00% $300.00	143.00% $775.00	151.00% $800.00	159.00% $825.00	167.00%	171.00%
{ 15}	135.00% $300.00	143.00% $775.00	151.00% $800.00	159.00% $825.00	167.00% $860.00	175.00%

Diagram O

	Salary Schedule - Amounts					
	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	21,450.00	23,423.40	25,019.28	26,906.88	29,111.94	30,888.00
{ 2}	22,093.50	24,099.08	25,714.26	27,627.60	29,864.84	31,660.20
{ 3}	22,951.50	24,999.98	26,640.90	28,588.56	30,868.70	32,689.80
{ 4}	23,809.50	25,900.88	27,567.54	29,549.52	31,872.56	33,719.40
{ 5}	24,667.50	26,801.78	28,494.18	30,510.48	32,876.42	34,749.00
{ 6}	25,525.50	27,702.68	29,420.82	31,471.44	33,880.28	35,778.60
{ 7}	26,383.50	28,603.58	30,347.46	32,432.40	34,884.14	36,808.20
{ 8}	27,241.50	29,504.48	31,274.10	33,393.36	35,888.00	37,837.80
{ 9}	28,099.50	30,405.38	32,200.74	34,354.32	36,891.86	38,867.40
{ 10}	28,957.50	31,306.28	33,127.38	35,315.28	37,895.72	39,897.00
{ 11}	29,257.50	32,207.18	34,054.02	36,276.24	38,899.58	40,926.60
{ 12}	29,257.50	32,982.18	34,980.66	37,237.20	39,903.44	41,956.20
{ 13}	29,257.50	32,982.18	35,780.66	38,198.16	40,907.30	42,985.80
{ 14}	29,257.50	32,982.18	35,780.66	39,023.16	41,911.16	44,015.40
{ 15}	29,257.50	32,982.18	35,780.66	39,023.16	42,771.16	45,045.00

Diagram P

Example 5:

This is an example of a salary schedule with a Maximum Step of **10** and Maximum Lane of **6**. The starting step in this example is **Step 1**. The salary schedule has a *step increment* of **5%**. There is <u>not</u> a *lane increment* as each lane has its own base amount. When building the Salary Schedule - Percents table, **5** was entered for the Step Percent Increment and the Lane Percent Increment field was left blank. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** (with a different base amount entered for each lane). Two decimal places were used as the default in this salary schedule. See **Diagrams Q, R, S, and T.**

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶ X	1	10	1	6	5.00		2			☐	☐
* X										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram Q

Salary Schedule - Amounts Recalculate Options

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶ X	1	10	1	1	18,500.00	2	Base
X	1	10	2	2	20,500.00	2	Base
X	1	10	3	3	21,750.00	2	Base
X	1	10	4	4	23,000.00	2	Base
X	1	10	5	5	25,550.00	2	Base
X	1	10	6	6	27,775.00	2	Base
* X							

Diagram R

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
{ 2}	105.00%	105.00%	105.00%	105.00%	105.00%	105.00%
{ 3}	110.00%	110.00%	110.00%	110.00%	110.00%	110.00%
{ 4}	115.00%	115.00%	115.00%	115.00%	115.00%	115.00%
{ 5}	120.00%	120.00%	120.00%	120.00%	120.00%	120.00%
{ 6}	125.00%	125.00%	125.00%	125.00%	125.00%	125.00%
{ 7}	130.00%	130.00%	130.00%	130.00%	130.00%	130.00%
{ 8}	135.00%	135.00%	135.00%	135.00%	135.00%	135.00%
{ 9}	140.00%	140.00%	140.00%	140.00%	140.00%	140.00%
{ 10}	145.00%	145.00%	145.00%	145.00%	145.00%	145.00%

Diagram S

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	18,500.00	20,500.00	21,750.00	23,000.00	25,550.00	27,775.00
{ 2}	19,425.00	21,525.00	22,837.50	24,150.00	26,827.50	29,163.75
{ 3}	20,350.00	22,550.00	23,925.00	25,300.00	28,105.00	30,552.50
{ 4}	21,275.00	23,575.00	25,012.50	26,450.00	29,382.50	31,941.25
{ 5}	22,200.00	24,600.00	26,100.00	27,600.00	30,660.00	33,330.00
{ 6}	23,125.00	25,625.00	27,187.50	28,750.00	31,937.50	34,718.75
{ 7}	24,050.00	26,650.00	28,275.00	29,900.00	33,215.00	36,107.50
{ 8}	24,975.00	27,675.00	29,362.50	31,050.00	34,492.50	37,496.25
{ 9}	25,900.00	28,700.00	30,450.00	32,200.00	35,770.00	38,885.00
{ 10}	26,825.00	29,725.00	31,537.50	33,350.00	37,047.50	40,273.75

Diagram T

Example 6:

This is an example of a salary schedule with a Maximum Step of **7** and Maximum Lane of **5**. The starting step in this example is **Step 1**. The salary schedule does <u>not</u> have any consistency at all, either with the *step increment* or *lane increment*. The amount for each step and lane was entered in the Additional Dollars field (for each cell). When building the Salary Schedule - Percents table, **0** was entered for both the step and lane percent increments. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** with the Base field left blank. Two decimal places were used as the default in this salary schedule. See **Diagrams U, V, W, and X**.

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶ ✕	1	7	1	5	.00	.00	2			☐	☐
＊ ✕										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram U

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶ ✕	1	7	1	5		2	Base
＊ ✕							

Salary Schedule - Amounts Recalculate Options

Diagram V

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}
{ 1}	100.00% $19,750.00	100.00% $20,450.00	100.00% $21,000.00	100.00% $22,225.00	100.00% $23,275.00
{ 2}	100.00% $20,000.00	100.00% $20,900.00	100.00% $21,865.00	100.00% $23,050.00	100.00% $23,995.00
{ 3}	100.00% $20,225.00	100.00% $21,375.00	100.00% $22,435.00	100.00% $23,975.00	100.00% $24,865.00
{ 4}	100.00% $21,225.00	100.00% $22,000.00	100.00% $23,000.00	100.00% $24,785.00	100.00% $25,495.00
{ 5}	100.00% $22,000.00	100.00% $22,675.00	100.00% $23,755.00	100.00% $25,695.00	100.00% $26,350.00
{ 6}	100.00% $22,450.00	100.00% $23,495.00	100.00% $24,500.00	100.00% $26,545.00	100.00% $27,075.00
{ 7}	100.00% $22,800.00	100.00% $24,550.00	100.00% $25,225.00	100.00% $27,325.00	100.00% $29,995.00

Diagram W

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}
{ 1}	19,750.00	20,450.00	21,000.00	22,225.00	23,275.00
{ 2}	20,000.00	20,900.00	21,865.00	23,050.00	23,995.00
{ 3}	20,225.00	21,375.00	22,435.00	23,975.00	24,865.00
{ 4}	21,225.00	22,000.00	23,000.00	24,785.00	25,495.00
{ 5}	22,000.00	22,675.00	23,755.00	25,695.00	26,350.00
{ 6}	22,450.00	23,495.00	24,500.00	26,545.00	27,075.00
{ 7}	22,800.00	24,550.00	25,225.00	27,325.00	29,995.00

Diagram X

Example 7:

This is an example of a salary schedule used for *unit* employees with a Maximum Step of **5** and Maximum Lane of **3**. The starting step in this example is **Step 1**. The salary schedule has a *step increment* of **3.5%**. Each lane has its own base amount. When building the Salary Schedule - Percents table, **3.5** was entered for the Step Percent Increment and the Lane Percent Increment field was left blank. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** (with a different base amount entered for each lane). Two decimal places were used as the default in this salary schedule. See **Diagrams Y, Z, AA, and BB**.

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶ ✕	1	5	1	3	3.50		2			☐	☐
✱ ✕										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram Y

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶ ✕	1	5	1	1	5.00	2	Base
✕	1	5	2	2	8.25	2	Base
✕	1	5	3	3	12.00	2	Base
✱ ✕							

Salary Schedule - Amounts Recalculate Options

Diagram Z

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}
{ 1}	100.00%	100.00%	100.00%
{ 2}	103.50%	103.50%	103.50%
{ 3}	107.00%	107.00%	107.00%
{ 4}	110.50%	110.50%	110.50%
{ 5}	114.00%	114.00%	114.00%

Diagram AA

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}
{ 1}	5.00	8.25	12.00
{ 2}	5.18	8.54	12.42
{ 3}	5.35	8.83	12.84
{ 4}	5.52	9.12	13.26
{ 5}	5.70	9.40	13.68

Diagram BB

Example 8:

This is an example of a salary schedule used for *extracurricular duties* with a Maximum Step of **10** and Maximum Lane of **6**. The starting step in this example is **Step 1**. Since the percents are less than 100% of the base, the percentage was entered for the *first step* in each lane in the Percent of Base field. When building the Salary Schedule - Percents table, **.5** was entered for the step percent increment and **0** for the lane percent increment for *Steps 2 through 5*. Then *Steps 6 through 10* were calculated at **0** for both the step and lane percent increments with an additional amount for each step after 5 years was entered in the Step Dollar Increment field (for each lane). After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** with **$20,450** as the base for *Steps 1 through 5* and then on **Previous** for *Steps 6 through 10*. Two decimal places were used as the default in this salary schedule. See **Diagrams CC, DD, EE, and FF**.

		Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶	✕	2	5	1	6	.50		2			☐	☐
	✕	6	10	1	1			2	50.00		☐	☐
	✕	6	10	2	2			2	30.00		☐	☐
	✕	6	10	3	3			2	50.00		☐	☐
	✕	6	10	4	5			2	30.00		☐	☐
	✕	6	10	6	6			2	25.00		☐	☐
＊	✕										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram CC

		Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶	✕	1	5	1	6	20,450.00	2	Base
	✕	6	10	1	6		2	Previous
＊	✕							

Salary Schedule - Amounts Recalculate Options

Diagram DD

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	10.00%	7.00%	10.00%	7.00%	8.00%	6.50%
{ 2}	10.50%	7.50%	10.50%	7.50%	8.50%	7.00%
{ 3}	11.00%	8.00%	11.00%	8.00%	9.00%	7.50%
{ 4}	11.50%	8.50%	11.50%	8.50%	9.50%	8.00%
{ 5}	12.00%	9.00%	12.00%	9.00%	10.00%	8.50%
{ 6}	100.00% $50.00	100.00% $30.00	100.00% $50.00	100.00% $30.00	100.00% $30.00	100.00% $25.00
{ 7}	100.00% $50.00	100.00% $30.00	100.00% $50.00	100.00% $30.00	100.00% $30.00	100.00% $25.00
{ 8}	100.00% $50.00	100.00% $30.00	100.00% $50.00	100.00% $30.00	100.00% $30.00	100.00% $25.00
{ 9}	100.00% $50.00	100.00% $30.00	100.00% $50.00	100.00% $30.00	100.00% $30.00	100.00% $25.00
{ 10}	100.00% $50.00	100.00% $30.00	100.00% $50.00	100.00% $30.00	100.00% $30.00	100.00% $25.00

Diagram EE

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	2,045.00	1,431.50	2,045.00	1,431.50	1,636.00	1,329.25
{ 2}	2,147.25	1,533.75	2,147.25	1,533.75	1,738.25	1,431.50
{ 3}	2,249.50	1,636.00	2,249.50	1,636.00	1,840.50	1,533.75
{ 4}	2,351.75	1,738.25	2,351.75	1,738.25	1,942.75	1,636.00
{ 5}	2,454.00	1,840.50	2,454.00	1,840.50	2,045.00	1,738.25
{ 6}	2,504.00	1,870.50	2,504.00	1,870.50	2,075.00	1,763.25
{ 7}	2,554.00	1,900.50	2,554.00	1,900.50	2,105.00	1,788.25
{ 8}	2,604.00	1,930.50	2,604.00	1,930.50	2,135.00	1,813.25
{ 9}	2,654.00	1,960.50	2,654.00	1,960.50	2,165.00	1,838.25
{ 10}	2,704.00	1,990.50	2,704.00	1,990.50	2,195.00	1,863.25

Diagram FF

Example 9:

This is an example of a salary schedule used for *extracurricular duties* with a Maximum Step of **7** and Maximum Lane of **6**. The starting step in this example is **Step 1**. Even though the package is for extracurricular duties, the package type selected when creating the package was Regular Contracts due to the fact that the salaries are dollar amounts rather than percentages of the base salary. When building the Salary Schedule - Percents table, the step and lane percent increments were left blank and **300** was entered for the step dollar increment for *Steps 1 through 7*. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Previous** with a different base amount for each lane. Two decimal places were used as the default in this salary schedule. See **Diagrams GG, HH, II, and JJ**.

	Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶ ✕	1	7	1	6			2	300.00		☐	☐
* ✕										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram GG

	Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶ ✕	1	7	1	1	2,000.00	2	Previous
✕	1	7	2	2	1,500.00	2	Previous
✕	1	7	3	3	1,300.00	2	Previous
✕	1	7	4	4	1,250.00	2	Previous
✕	1	7	5	5	2,000.00	2	Previous
✕	1	7	6	6	1,500.00	2	Previous
* ✕							

Salary Schedule - Amounts Recalculate Options

Diagram HH

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
{ 2}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00
{ 3}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00
{ 4}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00
{ 5}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00
{ 6}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00
{ 7}	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00	100.00% $300.00

Diagram II

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	2,000.00	1,500.00	1,300.00	1,250.00	2,000.00	1,500.00
{ 2}	2,300.00	1,800.00	1,600.00	1,550.00	2,300.00	1,800.00
{ 3}	2,600.00	2,100.00	1,900.00	1,850.00	2,600.00	2,100.00
{ 4}	2,900.00	2,400.00	2,200.00	2,150.00	2,900.00	2,400.00
{ 5}	3,200.00	2,700.00	2,500.00	2,450.00	3,200.00	2,700.00
{ 6}	3,500.00	3,000.00	2,800.00	2,750.00	3,500.00	3,000.00
{ 7}	3,800.00	3,300.00	3,100.00	3,050.00	3,800.00	3,300.00

Diagram JJ

Example 10:

This is an example of a salary schedule used for *extracurricular duties* with a Maximum Step of **7** and Maximum Lane of **6**. The starting step in this example is **Step 1**. The extracurricular salary is figured by multiplying the appropriate percentage for the activity by the salary in the coach/advisor's step in Lane 1 on the regular teacher salary schedule. The salary will continue to increase until the maximum step of Lane 1 on the Teacher's Salary Schedule has been reached (in this example, Step 7). To figure the percent to increment each step on the extracurricular schedule, the percentage for the activity was multiplied by the step percent increment on the regular teacher contract package. In this example, the teacher contract package steps increment by 4%, so each activity percentage was multiplied by 4% to determine the step percent increment (i.e. for head volleyball, 10% x 4% = 0.4; for assistant volleyball, 8% x 4% = 0.32; for cheer advisor, 6% x 4% = 0.24; etc.). Since the percents are less than 100% of the base, the percentage was entered for the *first step* in each lane in the Percent of Base field. When building the Salary Schedule - Percents table, the appropriate percent increment (0.4, 0.32, or 0.24) was entered for the step percent increment and **0** for the lane percent increment for *Steps 2 through 7*. After building the Salary Schedule - Percents table, the Salary Schedule - Amounts table was built by selecting to calculate on **Base** with **$21,000** as the base. Two decimal places were used as the default in this salary schedule. See **Diagrams KK, LL, MM, and NN**.

		Starting Step	Ending Step	Starting Lane	Ending Lane	Step Percent Increment	Lane Percent Increment	Decimal Places	Step Dollar Increment	Lane Dollar Increment	Zero	Geometric Progression
▶	X	2	7	1	1	.40		2			☐	☐
	X	2	7	2	2	.32		2			☐	☐
	X	2	7	3	4	.24		2			☐	☐
	X	2	7	5	5	.40		2			☐	☐
	X	2	7	6	6	.32		2			☐	☐
✳	X										☑	☑

Salary Schedule - Percents Recalculate Options

Diagram KK

		Starting Step	Ending Step	Starting Lane	Ending Lane	Base	Decimal Places	Salary Calculation Type
▶	X	1	7	1	6	21,000.00	2	Base
✳	X							

Salary Schedule - Amounts Recalculate Options

Diagram LL

Salary Schedule - Percents

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	10.00%	8.00%	6.00%	6.00%	10.00%	8.00%
{ 2}	10.40%	8.32%	6.24%	6.24%	10.40%	8.32%
{ 3}	10.80%	8.64%	6.48%	6.48%	10.80%	8.64%
{ 4}	11.20%	8.96%	6.72%	6.72%	11.20%	8.96%
{ 5}	11.60%	9.28%	6.96%	6.96%	11.60%	9.28%
{ 6}	12.00%	9.60%	7.20%	7.20%	12.00%	9.60%
{ 7}	12.40%	9.92%	7.44%	7.44%	12.40%	9.92%

Diagram MM

Salary Schedule - Amounts

	{ 1}	{ 2}	{ 3}	{ 4}	{ 5}	{ 6}
{ 1}	2,100.00	1,680.00	1,260.00	1,260.00	2,100.00	1,680.00
{ 2}	2,184.00	1,747.20	1,310.40	1,310.40	2,184.00	1,747.20
{ 3}	2,268.00	1,814.40	1,360.80	1,360.80	2,268.00	1,814.40
{ 4}	2,352.00	1,881.60	1,411.20	1,411.20	2,352.00	1,881.60
{ 5}	2,436.00	1,948.80	1,461.60	1,461.60	2,436.00	1,948.80
{ 6}	2,520.00	2,016.00	1,512.00	1,512.00	2,520.00	2,016.00
{ 7}	2,604.00	2,083.20	1,562.40	1,562.40	2,604.00	2,083.20

Diagram NN

Workshop Salary Schedule Examples

TEACHPERCT (Teacher Percent Package) Example:

	Salary Schedule - Amounts				
	{ 1} BA	{ 2} BA + 12	{ 3} BA + 24	{ 4} MA	{ 5} MA + 18
{ 1} Year 1	26,000.00	27,560.00	29,120.00	30,680.00	32,240.00
{ 2} Year 2	27,040.00	28,600.00	30,160.00	31,720.00	33,280.00
{ 3} Year 3	28,080.00	29,640.00	31,200.00	32,760.00	34,320.00
{ 4} Year 4	29,120.00	30,680.00	32,240.00	33,800.00	35,360.00
{ 5} Year 5	30,160.00	31,720.00	33,280.00	34,840.00	36,400.00
{ 6} Year 6	31,200.00	32,760.00	34,320.00	35,880.00	37,440.00
{ 7} Year 7	32,240.00	33,800.00	35,360.00	36,920.00	38,480.00

Diagram A

COOKS (Cooks Hourly Package) Example:

	Salary Schedule - Amounts				
	{ 1} Step1	{ 2} Step 2	{ 3} Step 3	{ 4} Step 4	{ 5} Step 5
{ 1} Regular Cook	7.25	7.50	7.75	8.00	8.25
{ 2} Asst Head Cook	8.00	8.25	8.50	8.75	9.00
{ 3} Head Cook	9.25	9.50	9.75	10.00	10.25

Diagram B

EXTRA (Extracurricular Package) Example:

	Salary Schedule - Amounts					
	{ 1} Volleyball	{ 2} Track	{ 3} Cheerleading	{ 4} Drama	{ 5} Head Football	{ 6} Asst Football
{ 1} Year 1	3,640.00	2,210.00	3,510.00	1,560.00	3,900.00	1,300.00
{ 2} Year 2	3,770.00	2,340.00	3,640.00	1,690.00	4,030.00	1,430.00
{ 3} Year 3	3,900.00	2,470.00	3,770.00	1,820.00	4,160.00	1,560.00
{ 4} Year 4	4,030.00	2,600.00	3,900.00	1,950.00	4,290.00	1,690.00
{ 5} Year 5	4,160.00	2,730.00	4,030.00	2,080.00	4,420.00	1,820.00
{ 6} Year 6	4,290.00	2,860.00	4,160.00	2,210.00	4,550.00	1,950.00
{ 7} Year 7	4,420.00	2,990.00	4,290.00	2,340.00	4,680.00	2,080.00
{ 8} Year 8	4,550.00	3,120.00	4,420.00	2,470.00	4,810.00	2,210.00
{ 9} Year 9	4,680.00	3,250.00	4,550.00	2,600.00	4,940.00	2,340.00
{ 10} Year 10	4,810.00	3,380.00	4,680.00	2,730.00	5,070.00	2,470.00

Diagram C

Negotiations Sample Reports

Packages Listing (Negotiations screen, **Reports** menu, **Reference Reports**)

```
Iowa Lab Data                              Packages Listing                              Page: 1
07/01/2014 3:25 PM                    Negotiation Package Listing                      User ID: SAS

Package: COOKS          Cooks Hourly Package              Active: X  Package Type: Unit        Year End: 2015
  Step Orientation: Across    Starting Step: 1   Ending Step: 5   Ending Lane: 3   Diagonal:    Main Package ID:    NE Comp:
  Pay Group ID      Pay Group Description               Pay Code ID    Pay Code Description          Pay Code Type
  HOTLUNCH          Hot Lunch                           REG            Regular Rate                  Add

Package: EXTRA          Extracurricular Package           Active: X  Package Type: Extracurricular  Year End: 2015
  Step Orientation: Down      Starting Step: 1   Ending Step: 10  Ending Lane: 6   Diagonal:    Main Package ID:    NE Comp:
  Pay Group ID      Pay Group Description               Pay Code ID    Pay Code Description          Pay Code Type
  CERTIFIED         Certified                           C02            Contract 2                   Contract
                                                        C03            Contract 3                   Contract
                                                        C04            Contract 4                   Contract

Package: TEACHPERCT     Teacher Percent Package           Active: X  Package Type: Regular Contracts  Year End: 2015
  Step Orientation: Down      Starting Step: 1   Ending Step: 7   Ending Lane: 5   Diagonal:    Main Package ID:    NE Comp:
  Pay Group ID      Pay Group Description               Pay Code ID    Pay Code Description          Pay Code Type
  CERTIFIED         Certified                           C01            Contract 1                   Contract
```

Employee Pay Code Report (Negotiations screen, **Payroll** menu, **Employees**, **Reports** menu)

```
Iowa Lab Data                          Employee Pay Code Report                          Page: 1
07/01/2014 3:57 PM                                                                      User ID: SAS

Pay Code: C01           Contract 1
  Employee ID   Employee Name        Year   Active    Pay Rate  Primary  Pay Group ID   Time Card Basis
  ANDEJUL       Anderson, Julia      2015   X                            HOTLUNCH       Actual Basis
  GREEDAL       Green, Dale          2015   X         2,507.92  X        CERTIFIED      Actual Basis
  JACKKAT       Jackson, Kathy       2015   X         2,030.00  X        CERTIFIED      Actual Basis
  JOHNJOE       Johnson, Joe         2015   X         1,820.00  X        CERTIFIED      Actual Basis
  PATTMAR       Patterson, Maria     2015   X           108.50  X        CERTIFIED      Actual Basis
  WHITMAR       White, Mary          2015   X         2,590.00  X        CERTIFIED      Actual Basis
  WILLBER       Williamson, Bert     2015   X         2,485.00  X        CERTIFIED      Actual Basis

Pay Code: CUST          Custodian
  Employee ID   Employee Name        Year   Active    Pay Rate  Primary  Pay Group ID   Time Card Basis
  THOMRIC       Thomas, Rick         2015   X                   X        ADMIN          Actual Basis

Pay Code: OT            Overtime Rate
  Employee ID   Employee Name        Year   Active    Pay Rate  Primary  Pay Group ID   Time Card Basis
  ANDEJUL       Anderson, Julia      2015   X            11.25           HOTLUNCH       Actual Basis

Pay Code: REG           Regular Rate
  Employee ID   Employee Name        Year   Active    Pay Rate  Primary  Pay Group ID   Time Card Basis
  ANDEJUL       Anderson, Julia      2015   X             7.50  X        HOTLUNCH       Actual Basis
  BAXTJAC       Baxter, Jackie       2015   X             8.25  X        HOTLUNCH       Actual Basis
  CASPBET       Casper, Betty        2015   X             9.75  X        HOTLUNCH       Actual Basis
```

Employee Step/Lane Listing - Employee File (Negotiations screen, **Reports** menu, **Employee Reports (NG)**)

Iowa Lab Data		Employee Step/Lane Listing - Employee File			Page: 1
07/01/2014 4:09 PM					User ID: SAS

Fiscal Year End: 2015

Employee ID	Employee Name	Description	Step	Lane	Package Description
CASPBET	Casper, Betty	Reg. Rate	3	3	Cooks Hourly Package
GREEDAL	Green, Dale	JH Soc Tch	7	4	Teacher Percent Package
GREEDAL	Green, Dale	Track Coach	8	2	Extracurricular Package
JACKKAT	Jackson, Kathy	Cheerlead	2	3	Extracurricular Package
JACKKAT	Jackson, Kathy	Drama	2	4	Extracurricular Package
JACKKAT	Jackson, Kathy	Elem Teach	2	3	Teacher Percent Package
JACKKAT	Jackson, Kathy	Volleyball	2	1	Extracurricular Package
JOHNJOE	Johnson, Joe	Math Teach	2	1	Teacher Percent Package
WILLBER	Williamson, Bert	FB Coach	7	5	Extracurricular Package
WILLBER	Williamson, Bert	HS Math Teacher	7	4	Teacher Percent Package

Employee Step/Lane Listing - Employee Negotiation Rates (Negotiations screen, **Reports** menu, **Employee Reports (NG)**)

Iowa Lab Data		Employee Step/Lane Listing - Employee Negotiation Rates			Page: 1
07/01/2014 4:13 PM					User ID: SAS

Fiscal Year End: 2015

Employee ID	Employee Name	Description	Step	Lane	Package Description
GREEDAL	Green, Dale	JH Soc Tch	7	4	Teacher Percent Package
JACKKAT	Jackson, Kathy	Elem Teach	2	3	Teacher Percent Package
JOHNJOE	Johnson, Joe	Math Teach	2	1	Teacher Percent Package
PATTMAR	Patterson, Maria	PE Teacher	4	3	Teacher Percent Package
WHITMAR	White, Mary	English Teacher	7	5	Teacher Percent Package
WILLBER	Williamson, Bert	HS Math Teacher	7	4	Teacher Percent Package

Employee Listing - Negotiation Information (Negotiations screen, **Reports** menu, **Employee Reports (NG)**)

Iowa Lab Data									Page: 1
07/01/2014 4:18 PM		Employee Listing - Negotiation Information							User ID: SAS

Pay Code ID	Check Description	Step	Lane	FTE	Additional Dollars	Additional Percent	Additional Degree Hours	Regular Days	Additional Days	Total Hours
Employee: ANDEJUL	Anderson, Julia K									
C01	Lunch Cook	1.00	0.00	1.0000	0.00	0.00	0.00	180.00		
OT	O.T. Rate	2.00	1.00	1.0000	0.00	0.00	0.00			
REG	Reg. Rate	2.00	1.00	1.0000	0.00	0.00	0.00			2080.00
Employee: GREEDAL	Green, Dale J									
C01	JH Soc Tch	7.00	4.00	1.0000	275.00	0.00	0.00	190.00		
C02	Track Coach	8.00	2.00	1.0000						
Employee: JACKKAT	Jackson, Kathy M									
C01	Elem Teach	2.00	3.00	1.0000	0.00	0.00	0.00	190.00		
C02	Cheerlead	2.00	3.00	1.0000	0.00	0.00	0.00			
C03	Volleyball	2.00	1.00	1.0000	0.00	0.00	0.00			
C04	Drama	2.00	4.00	1.0000	0.00	0.00	0.00			
Employee: JOHNJOE	Johnson, Joe P									
C01	Math Teach	2.00	1.00	1.0000	0.00	0.00	0.00	190.00		
Employee: PATTMAR	Patterson, Maria L									
C01	PE Teacher	4.00	3.00	0.0500	0.00	0.00	0.00	190.00		
Employee: WHITMAR	White, Mary A									
C01	English Teacher	7.00	5.00	1.0000	0.00	0.00	0.00	190.00		
Employee: WILLBER	Williamson, Bert J									
C01	HS Math Teacher	7.00	4.00	1.0000	0.00	0.00	0.00	190.00		
C02	FB Coach	7.00	5.00	1.0000	0.00	0.00	0.00			

Negotiation Deduction Rates Listing (Negotiations screen, **Reports** menu, **Reference Reports**)

Package: EXTRA   Extracurricular Package

Deduction: AFLAC   Aflac Cancer Ins - 125   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total

Deduction: AMERLIFE   American Life Ins Co   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total

Deduction: DUES   Dues-North Dakota Ed Assn   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total

Deduction: EQUITLIFE   Equitble Life Ins Co   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total

Deduction: GARNISH   Garnishment   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total

Deduction: HEALTH125   Travelers Health Ins 125   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total
FAMILY	163.00	259.00	422.00					200.00	350.00	550.00
SINGLE	0.00	259.00	259.00						350.00	350.00
SUPT	0.00	422.00	422.00						550.00	550.00

Deduction: HEALTHINS   Travelers Health Ins Co   Type: Deduction   Exclude Deduction:

Rate Description	Employee Rate	Employer Rate	Rate Total	Change Date	New Employee Rate	New Employer Rate	New Rate Total	Negotiations Employee Rate	Negotiations Employer Rate	Negotiations Rate Total
FAMILY	163.00	259.00	422.00					250.00	300.00	550.00
SINGLE	0.00	259.00	259.00						300.00	300.00
SUPT	0.00	422.00	422.00						550.00	550.00

Budget Batch Listing (Negotiations screen, **Options** menu, **Budgets**, **Reports** menu)

Batch Description: 2014-2015 New Budget   Processing Month: 11/2014

Fund: 10   General Fund

Chart of Account Number	Chart of Account Description	Description	Amount
Account Type: Expenditure			
10 1000 1000 100 0000 120	Teacher	PR Budget	24,603.60
10 1000 1000 100 0000 213	Life Insurance	PR Budget	53.33
10 1000 1000 100 0000 220	FICA	PR Budget	1,733.40
10 1000 1000 100 0000 231	Ipers	PR Budget	2,197.11
10 1000 1000 100 0000 273	Hospital Insurance	PR Budget	3,745.08
10 2000 1000 100 0000 120	Teacher	PR Budget	30,395.95
10 2000 1000 100 0000 213	Life Insurance	PR Budget	53.33
10 2000 1000 100 0000 220	FICA	PR Budget	2,083.79
10 2000 1000 100 0000 231	Ipers	PR Budget	2,714.39
10 2000 1000 100 0000 273	Health Insurance	PR Budget	3,745.08
10 3200 1000 100 0000 120	Teacher	PR Budget	84,882.42
10 3200 1000 100 0000 213	Life Insurance	PR Budget	213.31
10 3200 1000 100 0000 220	FICA	PR Budget	6,502.99
10 3200 1000 100 0000 231	Ipers	PR Budget	7,780.31
10 3200 1000 100 0000 273	Hospital Insurance	PR Budget	13,477.44
	Account Type Total: Expenditure		184,181.53

Salary Schedule Report (Negotiations screen, **Reports** menu, **Salary Schedule Reports**)
Note: The Salary Schedule Reports should be printed for only <u>one</u> package at a time.

1) Salary Schedule Type: Salary Schedule - Amounts Table
On the Report Printing Options screen, click the **Search** button for the Salary Schedule Type parameter and select **Salary** in order to print the Salary Schedule - Amounts table.

Iowa Lab Data 07/01/2014 4:27 PM	Salary Schedule Report				Page: 1 User ID: SAS
	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1 } Year 1 Salary	21,000.00	22,260.00	23,520.00	24,780.00	26,040.00
{ 2 } Year 2 Salary	21,840.00	23,100.00	24,360.00	25,620.00	26,880.00
{ 3 } Year 3 Salary	22,680.00	23,940.00	25,200.00	26,460.00	27,720.00
{ 4 } Year 4 Salary	23,520.00	24,780.00	26,040.00	27,300.00	28,560.00
{ 5 } Year 5 Salary	24,360.00	25,620.00	26,880.00	28,140.00	29,400.00
{ 6 } Year 6 Salary	25,200.00	26,460.00	27,720.00	28,980.00	30,240.00
{ 7 } Year 7 Salary	26,040.00	27,300.00	28,560.00	29,820.00	31,080.00

2) Salary Schedule Type: Salary Schedule - Percents Table
On the Report Printing Options screen, click the **Search** button for the Salary Schedule Type parameter and select **Additional Dollars** (if applicable) and **Percent of Base** in order to print the Salary Schedule - Percents table.

Iowa Lab Data 07/01/2014 4:29 PM	Salary Schedule Report Package ID TEACHPERCT; Salary Schedule Type Percent Of Base				Page: 1 User ID: SAS
	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1 } Year 1 Percent Of Base	100.00	106.00	112.00	118.00	124.00
{ 2 } Year 2 Percent Of Base	104.00	110.00	116.00	122.00	128.00
{ 3 } Year 3 Percent Of Base	108.00	114.00	120.00	126.00	132.00
{ 4 } Year 4 Percent Of Base	112.00	118.00	124.00	130.00	136.00
{ 5 } Year 5 Percent Of Base	116.00	122.00	128.00	134.00	140.00
{ 6 } Year 6 Percent Of Base	120.00	126.00	132.00	138.00	144.00
{ 7 } Year 7 Percent Of Base	124.00	130.00	136.00	142.00	148.00

3) Salary Schedule Type: FTE - Hours Table
On the Report Printing Options screen, click the **Search** button for the Salary Schedule Type parameter and select **FTE** and **Total Hours** in order to print the FTE - Hours table, or if desired, select only **FTE** in order to see just the FTE table.

Iowa Lab Data 07/01/2014 4:31 PM	Salary Schedule Report				Page: 1 User ID: SAS
	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1 } Year 1 FTE	0.00	0.00	0.00	0.00	0.00
{ 2 } Year 2 FTE	1.00	0.00	1.00	0.00	0.00
{ 3 } Year 3 FTE	0.00	0.00	0.00	0.00	0.00
{ 4 } Year 4 FTE	0.00	0.00	0.05	0.00	0.00
{ 5 } Year 5 FTE	0.00	0.00	0.00	0.00	0.00
{ 6 } Year 6 FTE	0.00	0.00	0.00	0.00	0.00
{ 7 } Year 7 FTE	0.00	0.00	0.00	2.00	1.00

4) Salary Schedule Type: Salary Totals Table
On the Report Printing Options screen, click the **Search** button for the Salary Schedule Type parameter and select **Total Salary** in order to print the Salary Totals table.

Iowa Lab Data 07/01/2014 4:34 PM	Salary Schedule Report				Page: 1 User ID: SAS
	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1 } Year 1 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 2 } Year 2 Total Salary	21,840.00	0.00	24,360.00	0.00	0.00
{ 3 } Year 3 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 4 } Year 4 Total Salary	0.00	0.00	1,302.00	0.00	0.00
{ 5 } Year 5 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 6 } Year 6 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 7 } Year 7 Total Salary	0.00	0.00	0.00	59,915.00	31,080.00

5) Salary Schedule Type: Benefit Totals Table

On the Report Printing Options screen, click the **Search** button for the Salary Schedule Type parameter and select **Total Benefits** in order to print the Benefit Totals table.

	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1} Year 1 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 2} Year 2 Total Benefits	1,670.76	0.00	1,716.24	0.00	0.00
{ 3} Year 3 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 4} Year 4 Total Benefits	0.00	0.00	2,856.84	0.00	0.00
{ 5} Year 5 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 6} Year 6 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 7} Year 7 Total Benefits	0.00	0.00	0.00	4,183.80	2,377.68

6) Salary Schedule Type: All Tables

	{ 1} BA	{ 2} BA+12	{ 3} BA+24	{ 4} MA	{ 5} MA+18
{ 1} Year 1 Additional Dollars	0.00	0.00	0.00	0.00	0.00
{ 1} Year 1 FTE	0.00	0.00	0.00	0.00	0.00
{ 1} Year 1 Percent Of Base	100.00	106.00	112.00	118.00	124.00
{ 1} Year 1 Salary	21,000.00	22,260.00	23,520.00	24,780.00	26,040.00
{ 1} Year 1 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 1} Year 1 Total Hours	0.00	0.00	0.00	0.00	0.00
{ 1} Year 1 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 2} Year 2 Additional Dollars	0.00	0.00	0.00	0.00	0.00
{ 2} Year 2 FTE	1.00	0.00	1.00	0.00	0.00
{ 2} Year 2 Percent Of Base	104.00	110.00	116.00	122.00	128.00
{ 2} Year 2 Salary	21,840.00	23,100.00	24,360.00	25,620.00	26,880.00
{ 2} Year 2 Total Benefits	1,670.76	0.00	1,716.24	0.00	0.00
{ 2} Year 2 Total Hours	0.00	0.00	0.00	0.00	0.00
{ 2} Year 2 Total Salary	21,840.00	0.00	24,360.00	0.00	0.00
{ 3} Year 3 Additional Dollars	0.00	0.00	0.00	0.00	0.00
{ 3} Year 3 FTE	0.00	0.00	0.00	0.00	0.00
{ 3} Year 3 Percent Of Base	108.00	114.00	120.00	126.00	132.00
{ 3} Year 3 Salary	22,680.00	23,940.00	25,200.00	26,460.00	27,720.00
{ 3} Year 3 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 3} Year 3 Total Hours	0.00	0.00	0.00	0.00	0.00
{ 3} Year 3 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 4} Year 4 Additional Dollars	0.00	0.00	0.00	0.00	0.00
{ 4} Year 4 FTE	0.00	0.00	0.05	0.00	0.00
{ 4} Year 4 Percent Of Base	112.00	118.00	124.00	130.00	136.00
{ 4} Year 4 Salary	23,520.00	24,780.00	26,040.00	27,300.00	28,560.00
{ 4} Year 4 Total Benefits	0.00	0.00	2,856.84	0.00	0.00
{ 4} Year 4 Total Hours	0.00	0.00	0.00	0.00	0.00
{ 4} Year 4 Total Salary	0.00	0.00	1,302.00	0.00	0.00
{ 5} Year 5 Additional Dollars	0.00	0.00	0.00	0.00	0.00
{ 5} Year 5 FTE	0.00	0.00	0.00	0.00	0.00
{ 5} Year 5 Percent Of Base	116.00	122.00	128.00	134.00	140.00
{ 5} Year 5 Salary	24,360.00	25,620.00	26,880.00	28,140.00	29,400.00
{ 5} Year 5 Total Benefits	0.00	0.00	0.00	0.00	0.00
{ 5} Year 5 Total Hours	0.00	0.00	0.00	0.00	0.00
{ 5} Year 5 Total Salary	0.00	0.00	0.00	0.00	0.00
{ 6} Year 6 Additional Dollars	0.00	0.00	0.00	0.00	0.00

Salary Schedule Index Report (Negotiations screen, **Reports** menu, **Salary Schedule Reports**)

Iowa Lab Data		Salary Schedule Index Report		Page: 1
07/01/2014 4:45 PM				User ID: SAS

Package ID: TEACHPERCT   Package Description: Teacher Percent Package

Employee ID	Employee Name	Step	Lane	Index
GREEDAL	Dale Green	{ 7} Year 7	{ 4} MA	142.0000
JACKKAT	Kathy Jackson	{ 2} Year 2	{ 3} BA+24	116.0000
JOHNJOE	Joe Johnson	{ 2} Year 2	{ 1} BA	104.0000
PATTMAR	Maria Patterson	{ 4} Year 4	{ 3} BA+24	124.0000
WHITMAR	Mary White	{ 7} Year 7	{ 5} MA+18	148.0000
WILLBER	Bert Williamson	{ 7} Year 7	{ 4} MA	142.0000
			Package Total:	776.0000

Employee Negotiation Rates Wage Report (Negotiations screen, **Reports** menu, **Employee Reports (NG)**)

Iowa Lab Data		Employee Negotiation Rates Wage Report			Page: 1
07/02/2014 9:42 AM					User ID: SAS

	Contract 1	Contract 2	Contract 3	Contract 4	Total
Green, Dale	30,095.00	1,155.00	0.00	0.00	31,250.00
Jackson, Kathy	24,360.00	735.00	945.00	525.00	26,565.00
Johnson, Joe	21,840.00	0.00	0.00	0.00	21,840.00
Patterson, Maria	1,302.00	0.00	0.00	0.00	1,302.00
White, Mary	31,080.00	0.00	0.00	0.00	31,080.00
Williamson, Bert	29,820.00	1,995.00	0.00	0.00	31,815.00

Negotiation Variance Report (Negotiations screen, **Reports** menu, **Other Reports**)

Iowa Lab Data		Negotiation Variance Report		Page: 1
07/02/2014 8:40 AM				User ID: SAS

Package: TEACHPERCT   Teacher Percent Package

Employee ID	Employee Name	Payroll Wages	Negotiated Wages	Variance
GREEDAL	Green, Dale	26,500.00	30,095.00	3,595.00
JACKKAT	Jackson, Kathy	22,000.00	24,360.00	2,360.00
JOHNJOE	Johnson, Joe	19,750.00	21,840.00	2,090.00
PATTMAR	Patterson, Maria	12,000.00	1,302.00	(10,698.00)
WHITMAR	White, Mary	29,315.00	31,080.00	1,765.00
WILLBER	Williamson, Bert	29,000.00	29,820.00	820.00

Package Comparison Report (Negotiations screen, **Reports** menu, **Other Reports**)

Iowa Lab Data		Package Comparison Report		Page: 1
07/02/2014 8:42 AM				User ID: SAS

	Cooks Hourly Package	Extracurricular Package	Teacher Percent Package	Total
Wages	53,040.00	5,355.00	138,497.00	196,892.00
Medicare	769.08	77.19	1,936.92	2,783.19
Prudential Life Ins Co	158.40	0.00	316.80	475.20
Ret-Iowa Public Empl Ret Sys	4,736.47	478.20	12,566.15	17,780.82
Social Security	3,288.48	330.06	8,281.08	11,899.62
Travelers Health Ins 125	0.00	0.00	7,416.00	7,416.00
Travelers Health Ins Co	11,124.00	0.00	11,124.00	22,248.00
	73,116.43	6,240.45	180,137.95	259,494.83

Package Comparison Report by Employee with Benefits (Negotiations screen, **Reports** menu, **Other Reports**)

Iowa Lab Data
07/02/2014 8:45 AM
Package Comparison Report by Employee with Benefits

	+500 Teacher Percent Package	Teacher Percent Package
Green Dale	39,434.14	38,606.47
Jackson Kathy	32,688.51	32,012.40
Johnson Joe	29,828.09	29,221.92
Patterson Maria	4,194.89	1,938.84
White Mary	40,856.56	39,993.96
Williamson Bert	39,192.03	38,364.36
	186,194.22	180,137.95

Package Comparison Report by Employee without Benefits (Negotiations screen, **Reports** menu, **Other Reports**)

Iowa Lab Data
07/02/2014 8:47 AM
Package Comparison Report by Employee without Benefits

	+500 Teacher Percent Package	Teacher Percent Package
Green Dale	30,805.00	30,095.00
Jackson Kathy	24,940.00	24,360.00
Johnson Joe	22,360.00	21,840.00
Patterson Maria	1,333.00	1,302.00
White Mary	31,820.00	31,080.00
Williamson Bert	30,530.00	29,820.00
	141,788.00	138,497.00

Employee Itemized Totals Report (Negotiations screen, **Reports** menu, **Employee Reports (NG)**)

Iowa Lab Data   Employee Itemized Totals Report   Page: 1
07/02/2014 9:01 AM   User ID: SAS

Green, Dale

			Employee	Employer	
JH Soc Tch	TEACHPERCT	{ 7} Year 7	{ 4} MA		30,095.00
AFLAC	Aflac Cancer Ins - 125		126.00	0.00	
DUES	Dues-ISEA		420.00	0.00	
FIT	Federal Income Tax		804.84	0.00	
HEALTH125	Travelers Health Ins 125		2,100.00	3,708.00	
HSA	Health Savings Account		900.00	0.00	
LTD	Long Term Disability		22.32	0.00	
MEDICARE	Medicare		391.08	391.08	
NWMUTLIFE	Northwestern Mutual Life		780.00	0.00	
PRUDENTIAL	Prudential Life Ins Co		0.00	52.80	
RET	Ret-Iowa Public Empl Ret Sys		1,790.64	2,687.51	
SITIA	Iowa SIT		768.00	0.00	
SOCSEC	Social Security		1,672.08	1,672.08	
UNITEDWAY	United Way		150.00	0.00	
			9,924.96	8,511.47	38,606.47

Jackson, Kathy

			Employee	Employer	
Elem Teach	TEACHPERCT	{ 2} Year 2	{ 3} BA+24		24,360.00
AFLAC	Aflac Cancer Ins - 125		126.00	0.00	
DUES	Dues-ISEA		420.00	0.00	
EQUITLIFE	Equitble Life Ins Co		600.00	0.00	
FIT	Federal Income Tax		2,266.44	0.00	
HEALTHINS	Travelers Health Ins Co		0.00	3,708.00	
HSA	Health Savings Account		1,800.00	0.00	
LTD	Long Term Disability		18.00	0.00	

MEDICARE	Medicare	325.32	325.32	
PRUDENTIAL	Prudential Life Ins Co	0.00	52.80	
RET	Ret-Iowa Public Empl Ret Sys	1,449.48	2,175.36	
SITIA	Iowa SIT	660.00	0.00	
SOCSEC	Social Security	1,390.92	1,390.92	
		9,056.16	7,652.40	32,012.40

Williamson, Bert — Employee — Employer

				Employee	Employer
HS Math Teacher	TEACHPERCT { 7} Year 7		{ 4} MA		29,820.00
AMERLIFE	American Life Ins Co			54.00	0.00
DUES	Dues-ISEA			420.00	0.00
FIT	Federal Income Tax			1,599.60	0.00
HEALTH125	Travelers Health Ins 125			2,100.00	3,708.00
MEDICARE	Medicare			402.00	402.00
NWMUTLIFE	Northwestern Mutual Life			1,500.00	0.00
PRUDENTIAL	Prudential Life Ins Co			0.00	52.80
RET	Ret-Iowa Public Empl Ret Sys			1,774.32	2,662.92
SITIA	Iowa SIT			960.00	0.00
SOCSEC	Social Security			1,718.64	1,718.64
UNITEDWAY	United Way			300.00	0.00
				10,828.56	8,544.36	38,364.36

Package ID	Package Description	Amount	Employer Deduction Total	Employee Deduction Total	Expense Total
TEACHPERCT	Teacher Percent Package	54,180.00	16,196.76	19,884.72	70,376.76
		54,180.00	16,196.76	19,884.72	70,376.76

Computation of Salary Report (Negotiations screen, **Reports** menu, **Other Reports**)

Iowa Lab Data	Computation of Salary Report	Page: 1
07/02/2014 9:14 AM		User ID: SAS

Package: TEACHPERCT Teacher Percent Package
Employee: JACKKAT Jackson Kathy

Pay Type: Contract

Contract 1	24,360.00
	24,360.00

Pay Type: Deduction

Prudential Life Ins Co	52.80
Ret-Iowa Public Empl Ret Sys	2,175.36
Travelers Health Ins Co	3,708.00
	5,936.16

Pay Type: Tax

Medicare	325.32
Social Security	1,390.92
	1,716.24
Employee Total:	32,012.40

Employee: PATTMAR Patterson Maria

Pay Type: Contract

Contract 1	1,302.00
	1,302.00

Pay Type: Deduction

Prudential Life Ins Co	52.80
Ret-Iowa Public Empl Ret Sys	314.52
	367.32

Pay Type: Tax

Medicare	51.12
Social Security	218.40
	269.52
Employee Total:	1,938.84

Employee: WHITMAR White Mary
  Pay Type: Contract
    Contract 1   31,080.00
                                            31,080.00
  Pay Type: Deduction
    Prudential Life Ins Co   52.80
    Ret-Iowa Public Empl Ret Sys   2,775.48
    Travelers Health Ins Co   3,708.00
                                             6,536.28
  Pay Type: Tax
    Medicare   450.72
    Social Security   1,926.96
                                             2,377.68
              Employee Total: 39,993.96
Employee: WILLBER Williamson Bert
  Pay Type: Contract
    Contract 1   29,820.00
                                            29,820.00
  Pay Type: Deduction
    Prudential Life Ins Co   52.80
    Ret-Iowa Public Empl Ret Sys   2,662.92
    Travelers Health Ins 125   3,708.00
                                             6,423.72
  Pay Type: Tax
    Medicare   402.00
    Social Security   1,718.64
                                             2,120.64
              Employee Total: 38,364.36

              Package Total: 180,137.95

              All Packages Total: 180,137.95

LAB EXERCISES

Lab Exercise 1: Packages and Define Pay Scales

1. Create a Unit type package called "Custodians Package" for the next fiscal year end. Select the CUST pay code and the ADMIN pay group. The steps go down on the salary schedule with a starting step of 1, ending step of 5, and ending lane of 3.
2. Enter the labels for each step and lane on the salary schedule for the Custodians Package as follows:

    Steps: 1 = Year 1; 2 = Year 2; 3 = Year 3; 4 = Year 4; 5 = Year 5

    Lanes: 1 = Elementary Custodian; 2 = High School Custodian; 3 = Supervisor
3. Review the salary schedule to verify the labels for each step and lane for the Custodians Package are correct.

Lab Exercise 2: Employee File and Create Payroll Wages for New Year

1. Complete the negotiation information on the Wages screen in the Employee File for Rick Thomas. Edit the CUST pay code (which is a unit pay code and will be included in the Custodians Package) to include the following information:

    FTE: 1   Step: 4   Lane: 2

    Total Payments: 12   Total Hours: 2080

2. Create the new wages for the next fiscal year for the pay codes assigned to the Custodian Package by completing the Create Payroll Wages for New Year option (accessed from the **Options** menu on the Negotiations screen). Create blank wages for the next fiscal year end, leave the Start Date field <u>blank</u>, and increment the steps. Select the ADMIN pay group and the CUST pay code.

3. Verify the new pay code was created for the next fiscal year end in the Employee File for Rich Thomas.

4. Generate a report and verify the step and lane for Rich Thomas are correct.

Lab Exercise 3: Salary Schedules

1. Build the salary schedules for the Custodians Package.
    a. Recalculate the Salary Schedule - Percents table for the entire package (include all steps and lanes). The steps increment by $0.50 and the lanes increment by $1.00 (select the Geometric Progression field). Include two decimal places on the table. After executing, review the Salary Schedule - Percents table.
    b. Recalculate the Salary Schedule - Amounts table for the entire package (include all steps and lanes). Enter a base of $10.00 and select Previous as the Salary Calculation Type. Include two decimal places on the table. After executing, verify the Salary Schedule - Amounts table matches the following diagram:

	Salary Schedule - Amounts		
	{ 1} Elementary Custodian	{ 2} High School Custodian	{ 3} Supervisor
{ 1} Year 1	10.00	11.00	12.00
{ 2} Year 2	10.50	11.50	12.50
{ 3} Year 3	11.00	12.00	13.00
{ 4} Year 4	11.50	12.50	13.50
{ 5} Year 5	12.00	13.00	14.00

    c. Recalculate the FTE - Hours table. Do <u>not</u> select the Reset Employee Steps and Lanes option. After executing, review the FTE - Hours table.
    d. Recalculate the Salary Totals table for the entire package (include all steps and lanes). Include two decimal places on the table. After executing, review the Salary Totals table.
    e. Recalculate the Benefit Totals table. Leave the Pay Periods Per Year field <u>blank</u> in order to use the number entered in the Total Payments field on the Wages screen for each employee. After executing, review the Benefit Totals table.
2. Generate the Employee Itemized Totals Report for the Custodians Package.