Agenda

- Introduction
- Overview
- Part 1 - Effective Dated Pays
  - New Base Pay
  - Dates and how they are used
  - Relationship to Salary Tables
  - Duplicating vs. Adding
  - Other Employee Pay Changes
- Key Takeaways

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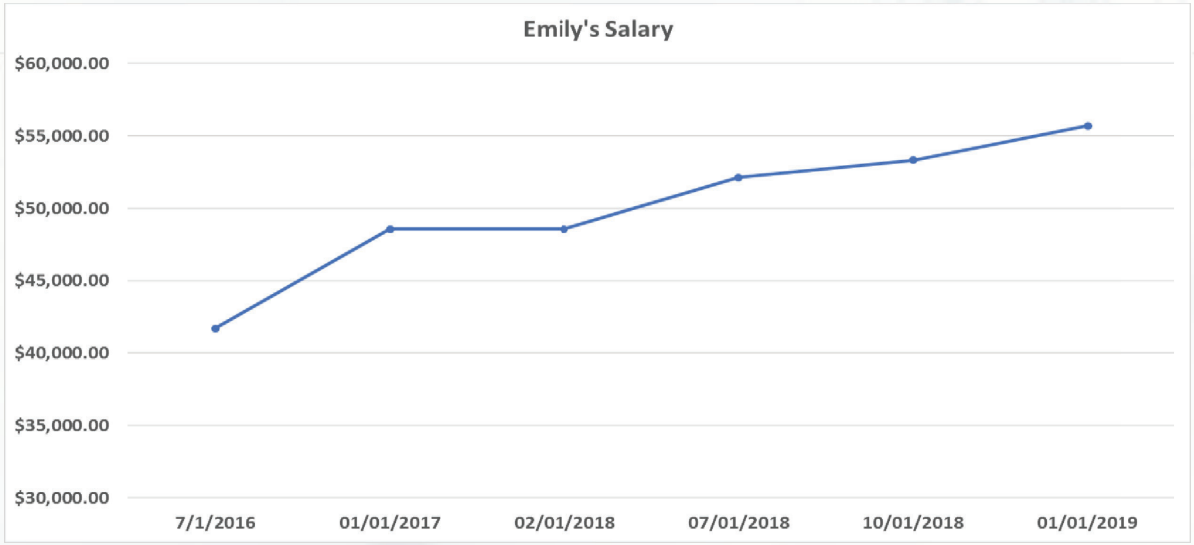
Benefits of Effective Dating

- Track a history of position and salary changes
- Plan for the future
- Automate retroactive payments



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Comparison of V11.3 to V2019.1

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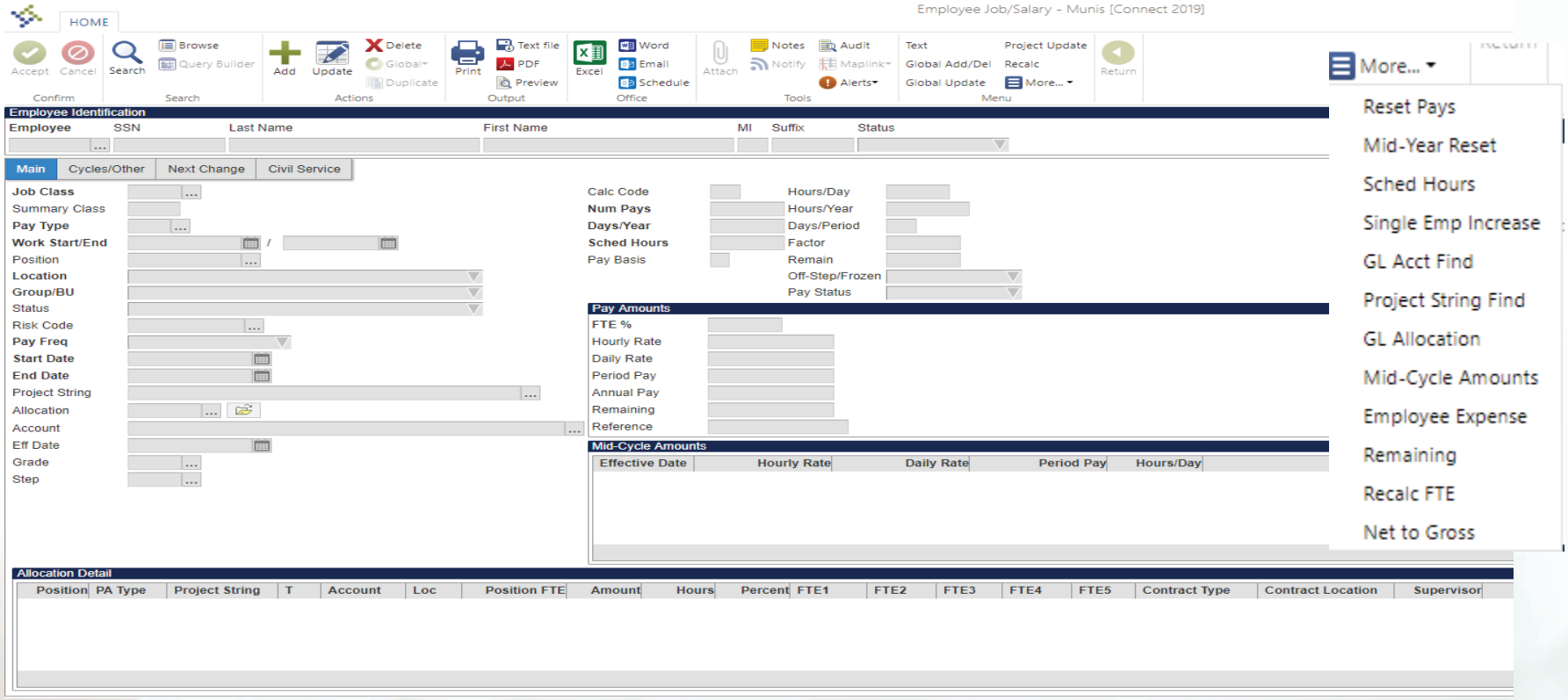
Job Salary in V11.3



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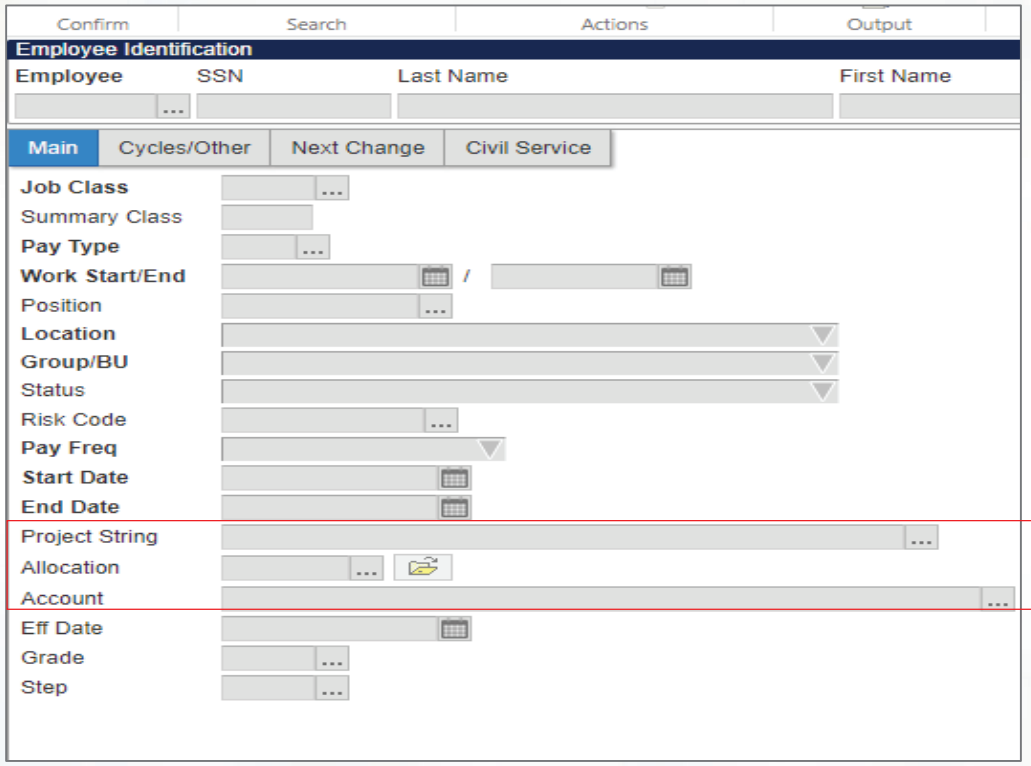
Job Salary in V11.3



- Account number field is displayed here for all records, even if an allocation is in use. If an allocation is used this field will be blank.
- Dates are not logically named.

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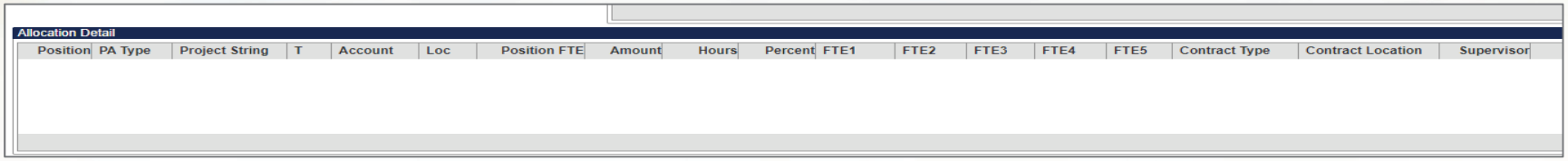
Job Salary in V11.3



- All accounts will show here with associated information, but the fields cannot be edited.

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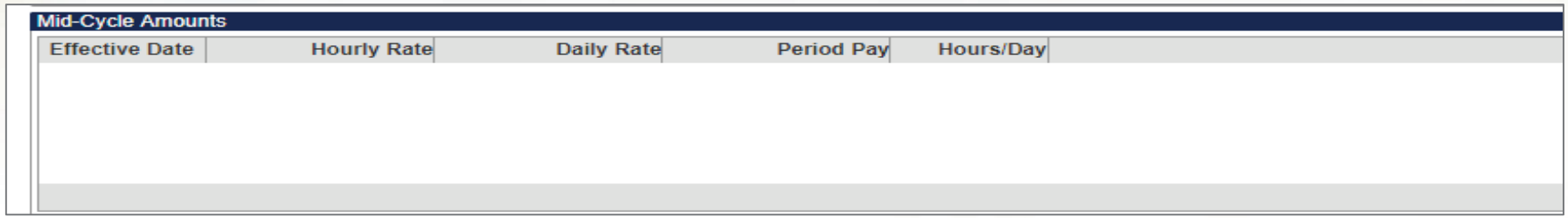
Job Salary in V11.3



- The Mid-Cycle section of the screen holds information related to pay changes and dates.

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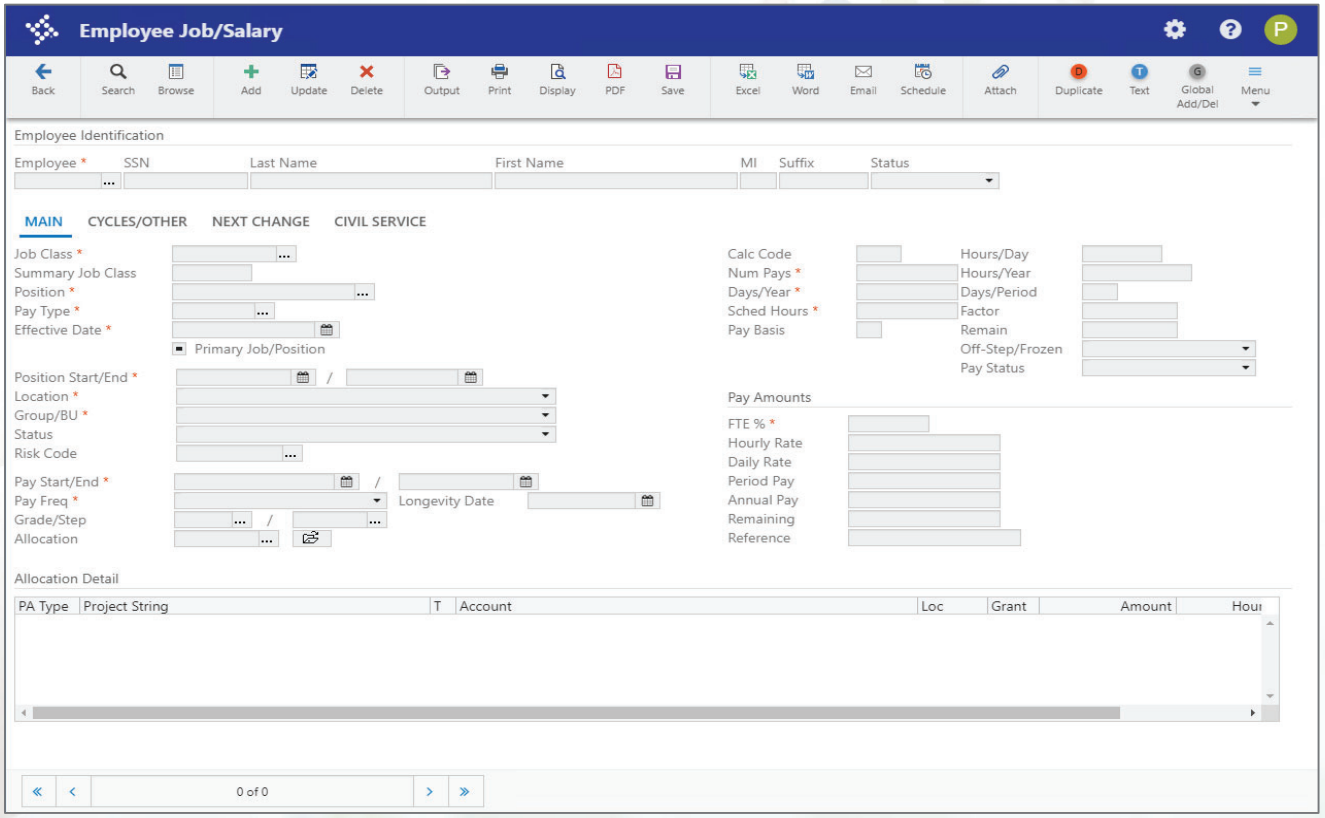
Job Salary in 2018 and higher



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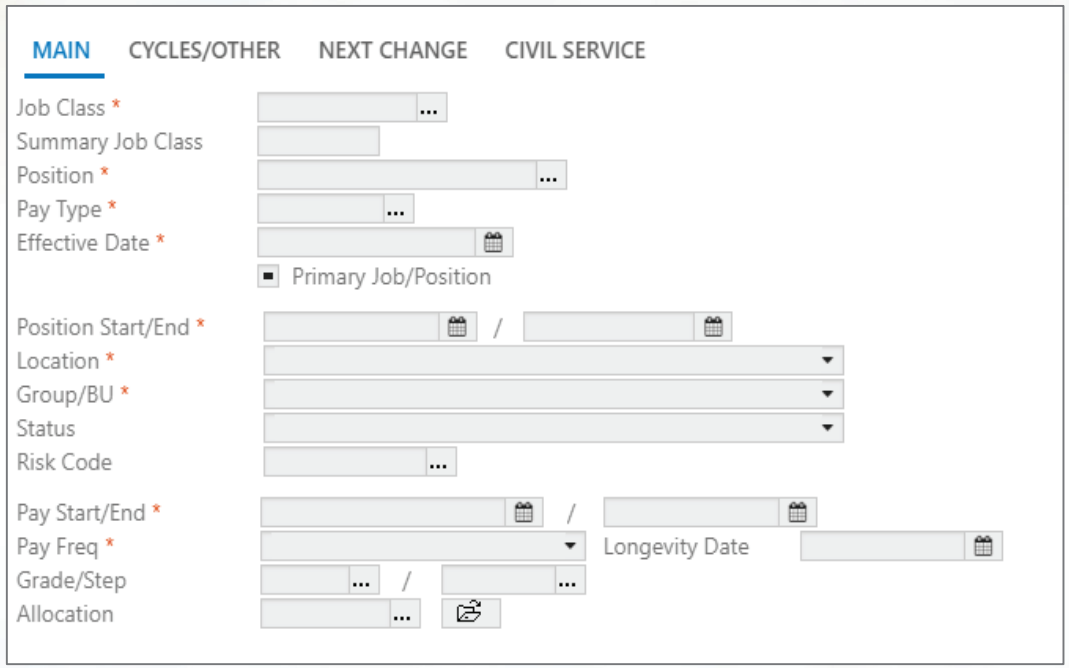
Job Salary in 2018 and higher



- Effective date has been moved up from the lower part of the screen. It is now part of the record key.
- The account line has been removed.
- Date fields are renamed.

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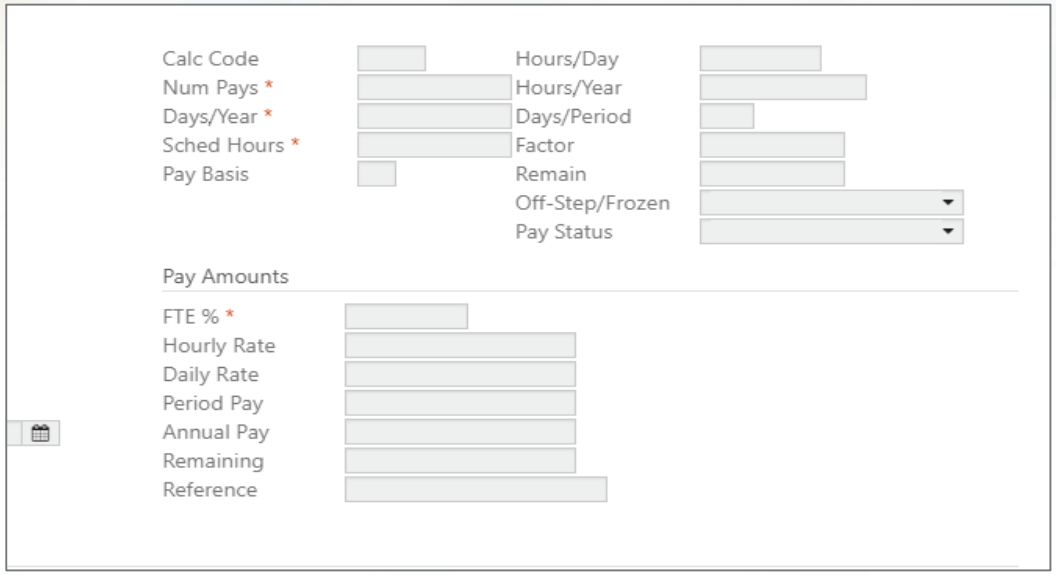
Job Salary in 2018 and higher



- Mid-Cycle information has been removed now that pays can be effective dated.

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Job Salary in 2018 and higher

- The account display grid has been modified and can be edited.
- Redundant information has been removed.
- All accounts display here.
- Manual allocations can be created by simply adding additional accounts.

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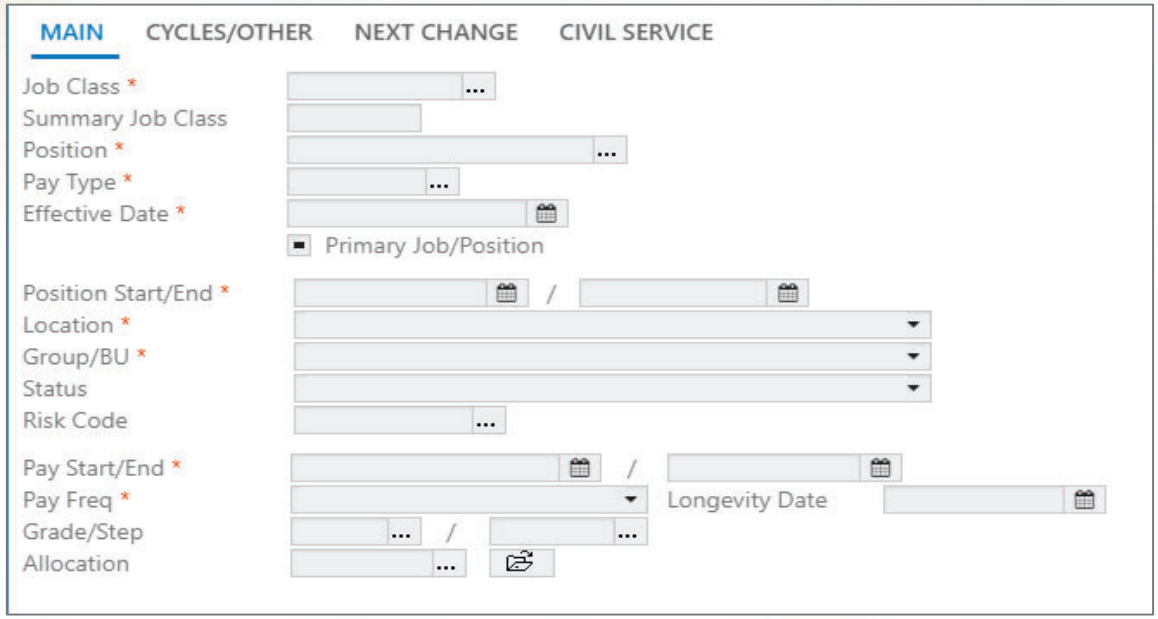
Job Salary in 2018 and higher



- Dates have been renamed. Hopefully this will result in easier to use and understand information.
- Notice that we now have Position Start and End, Pay Start and End, and Longevity Date, in addition to the Effective Date that is now part of the key information.

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Employee Pay: Example 1

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Example 1: Let's give our accountant a raise

- Emily is due for a raise (employee 105)

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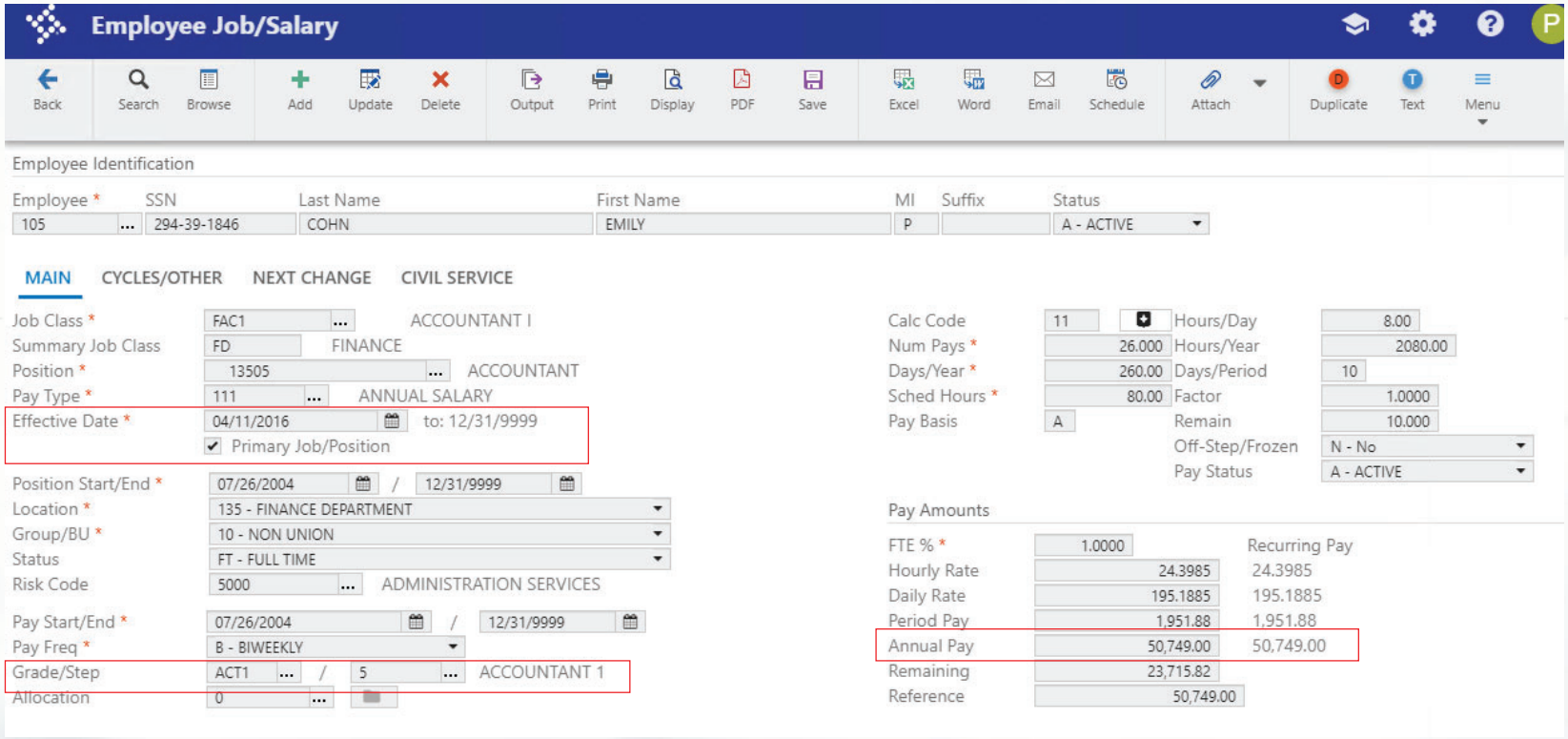
Emily's Current Base Pay



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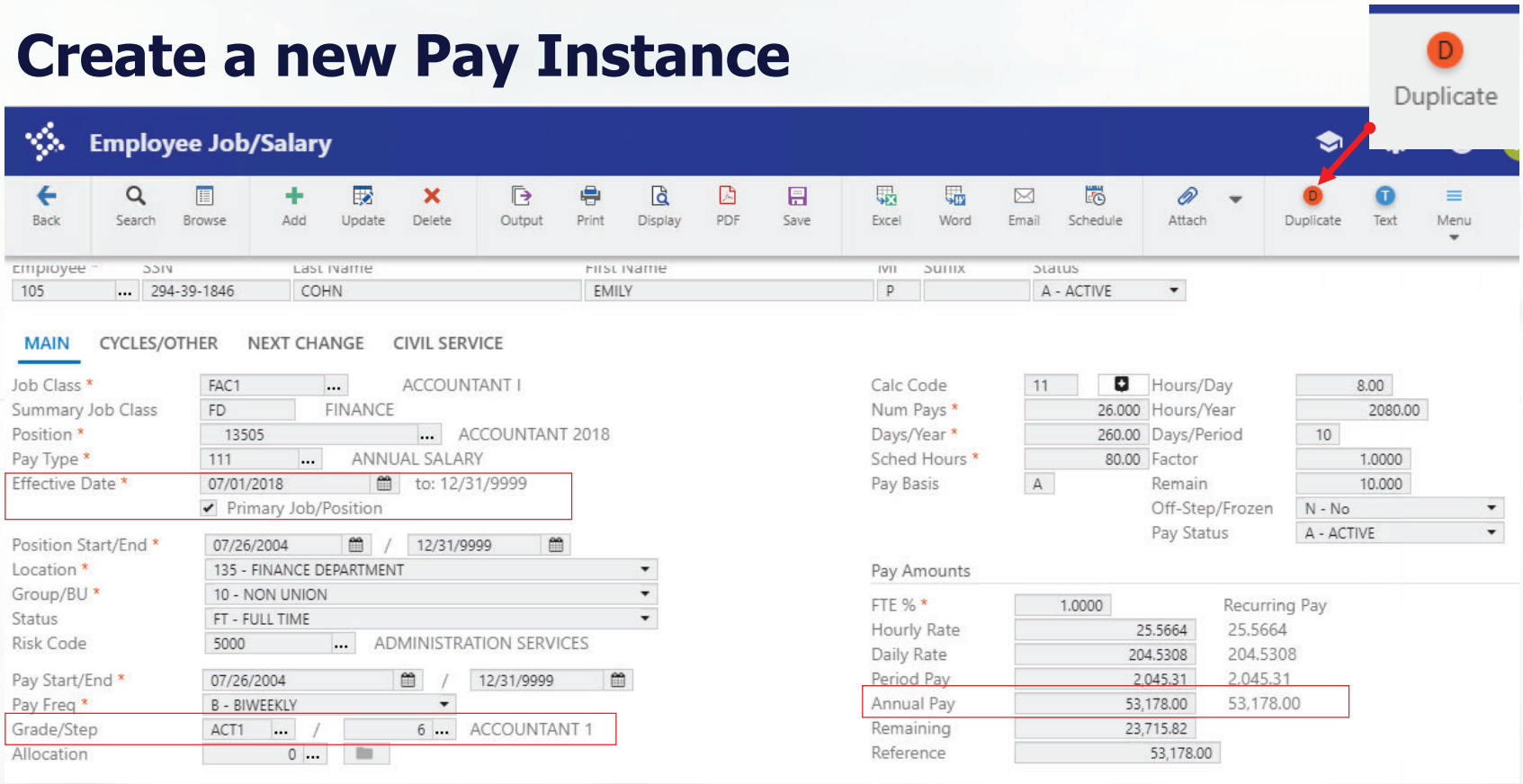
Create a new Pay Instance



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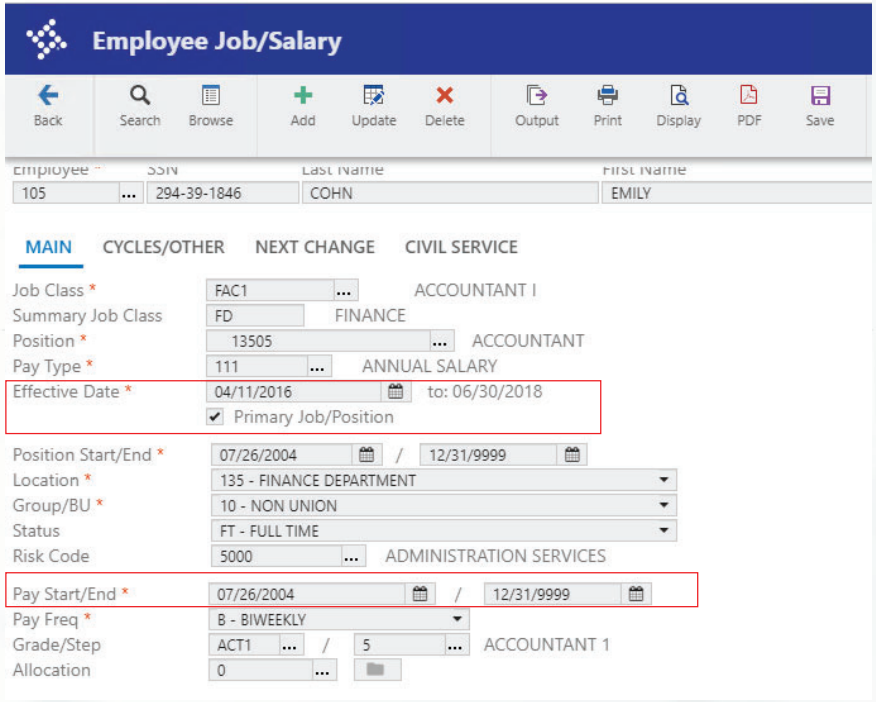
Pay Over Time



Original Pay Record

- Now has a system calculated effective end date
- Pay End has not been changed

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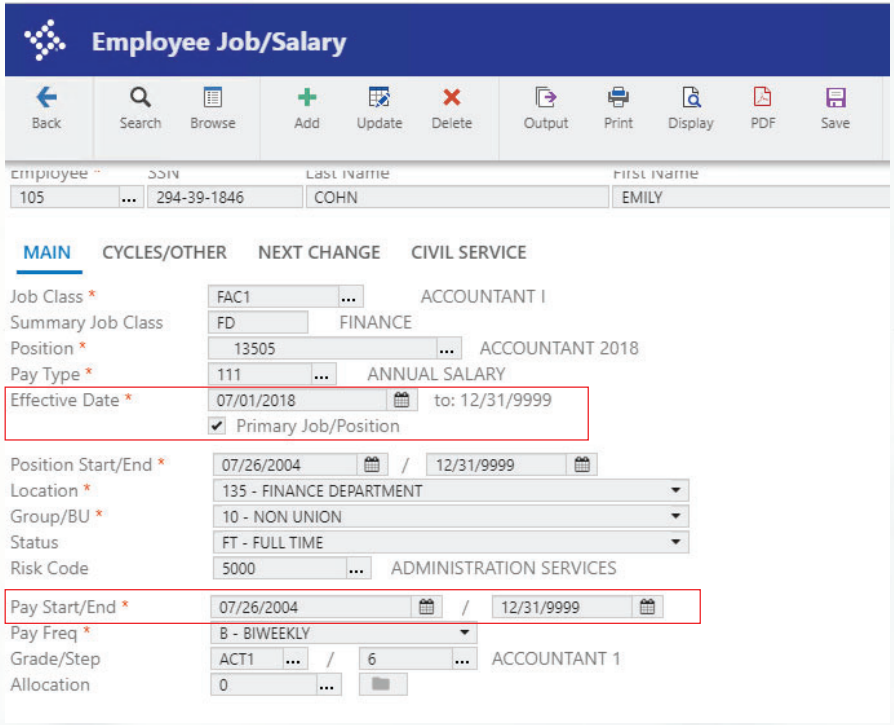
Pay Over Time



Duplicated (new) Pay Record

- System calculated effective end date at maximum default
- Pay End set the same

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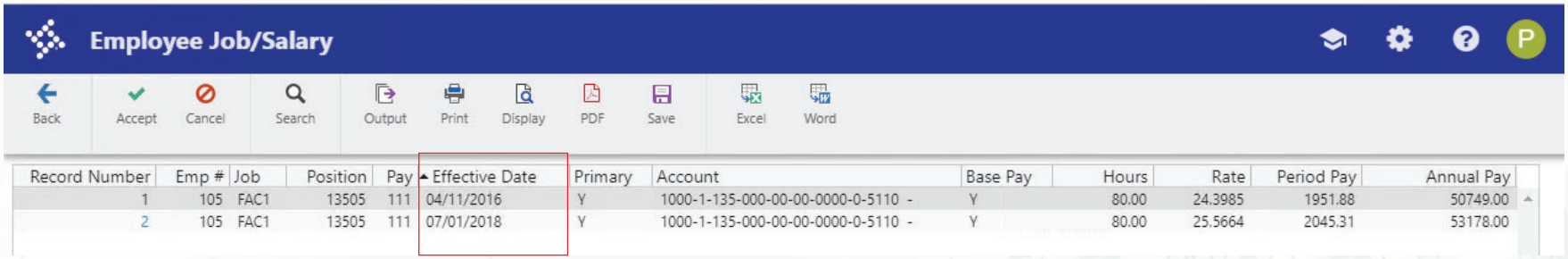
Pay Over Time



Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay
1	105	FAC1	13505	111	04/11/2016	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	24.3985	1951.88	50749.00
2	105	FAC1	13505	111	07/01/2018	Y	1000-1-135-000-00-00-0000-0-5110 -	Y	80.00	25.5664	2045.31	53178.00

Browse the record set. This will show pay history for the employee over time.

Export to Excel for a great report of historical pay.

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Employee Pay – Recap of Changes

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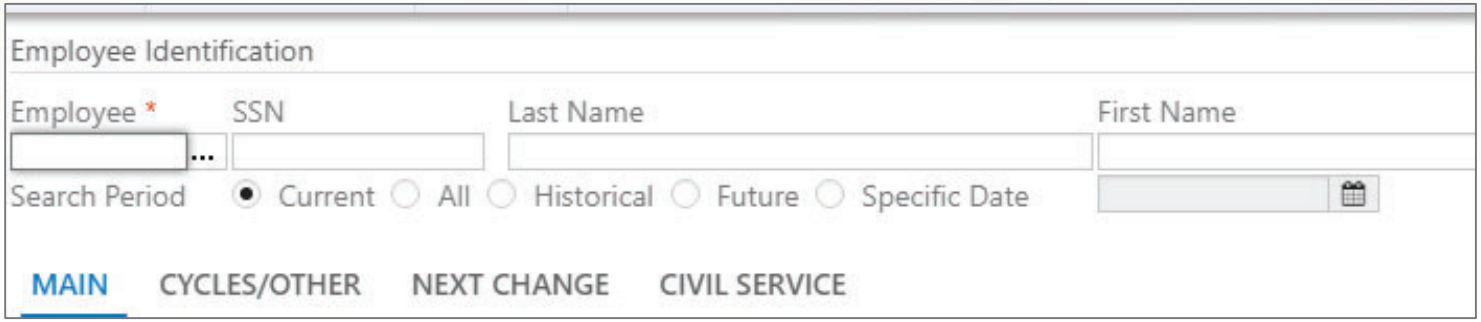
New Search Period



- A new addition to the find option is the ability to search based on time. The Search Period is only available in Find mode. There are five options: Current, All, Historical, Future, and Specific Date.
- The chosen option is saved by User and will default on the next Find that is performed.

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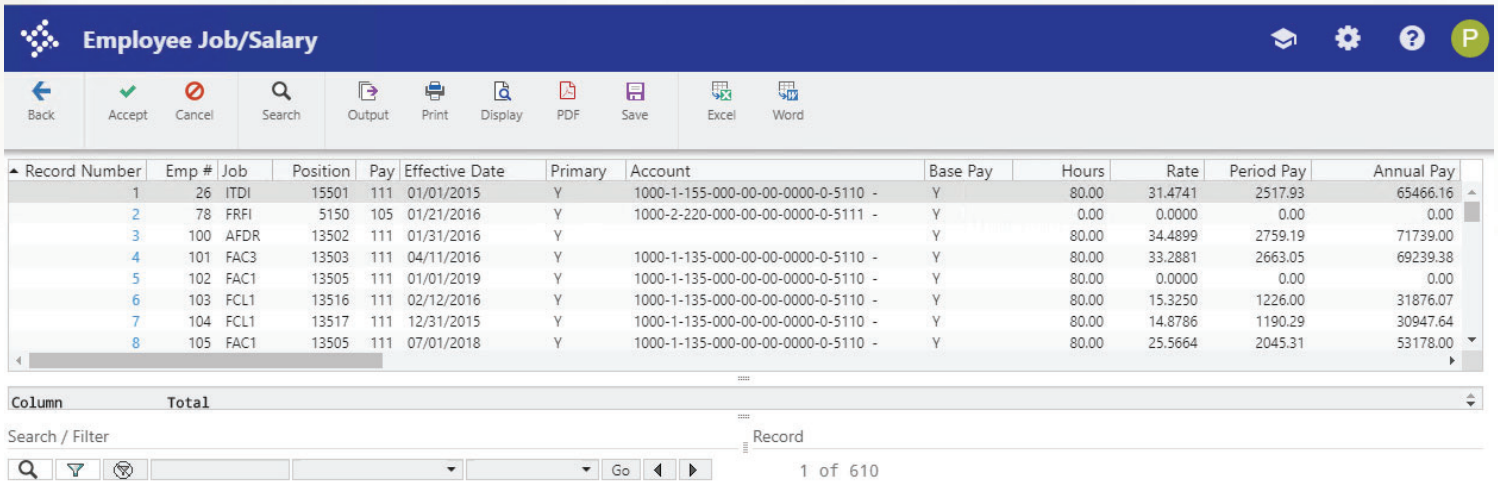
New Search Period - Current



610 Base Pay records returned with various effective dates, and they are all currently active and in effect.

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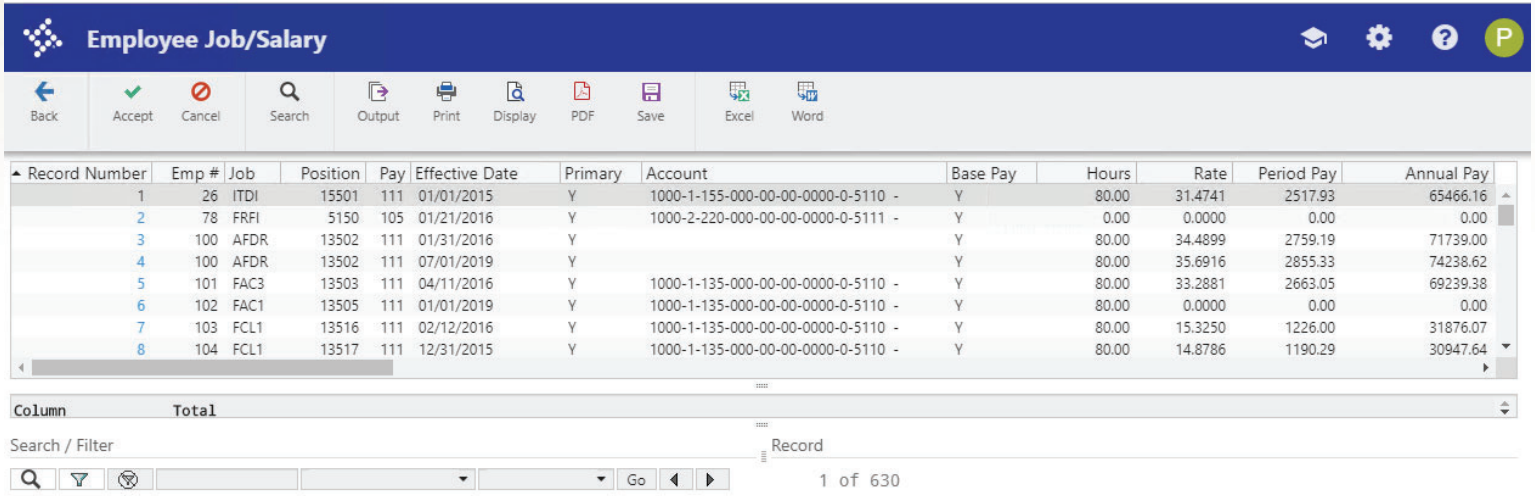
New Search Period - All



630 Base Pay records returned with various effective dates; however some are not currently active due to the effective date.

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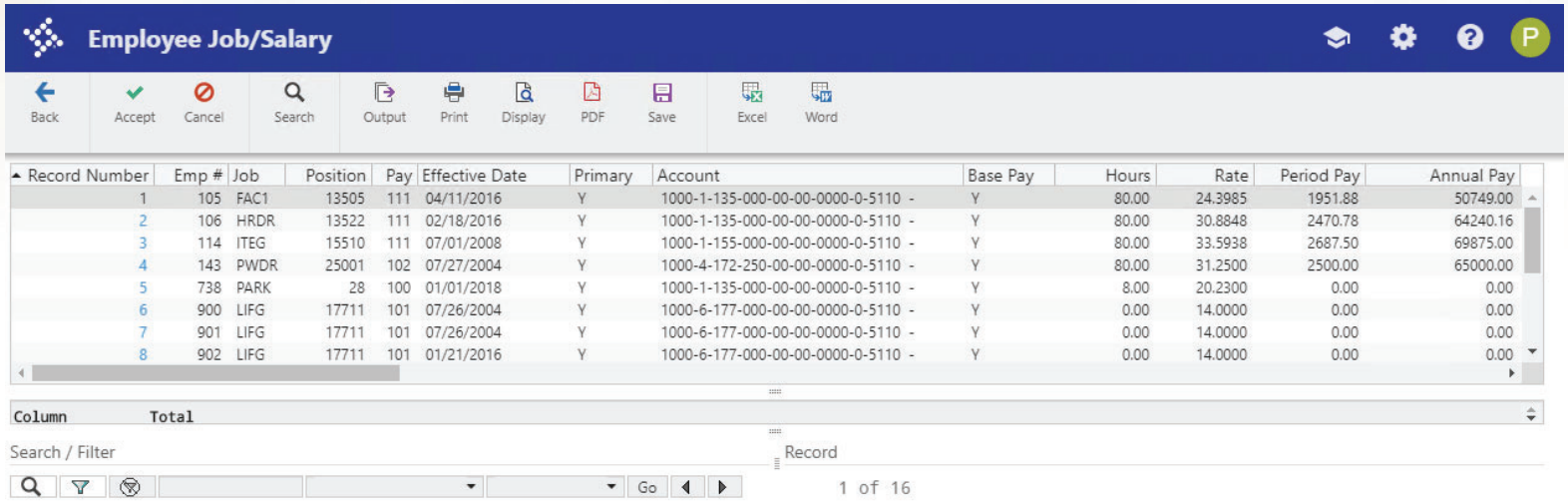
New Search Period - Historical



16 Base Pay records returned with various effective dates; however none of them are currently active due to the effective date.

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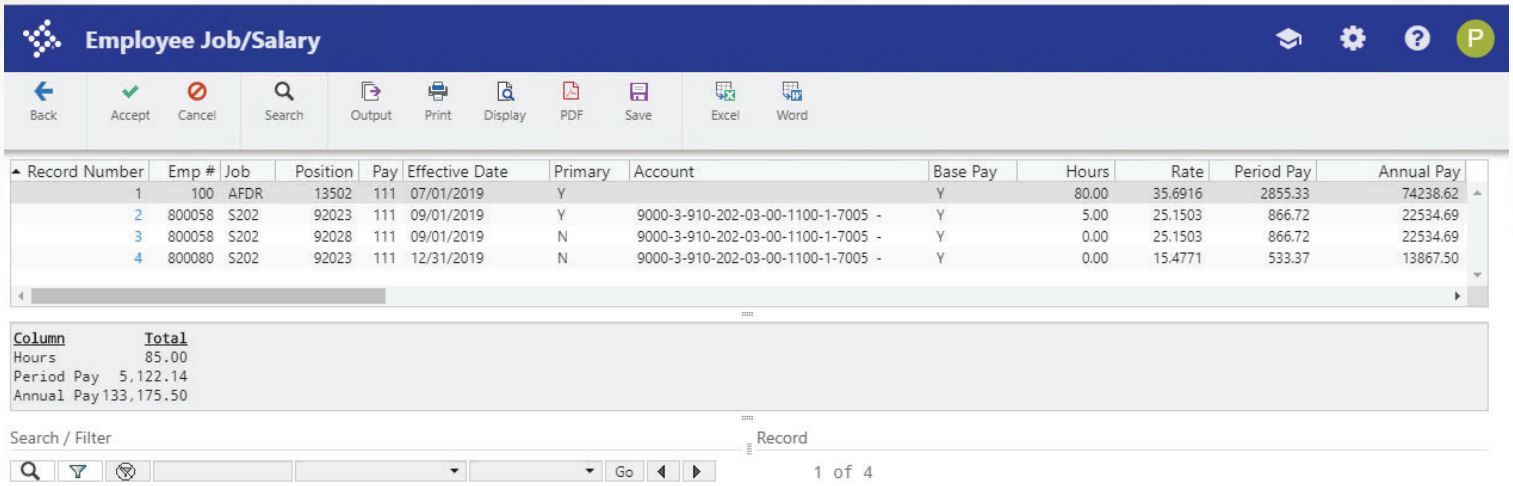
New Search Period - Future



4 Base Pay records returned with various future effective dates. None of them are currently effective, and will only become active after the effective date has passed.

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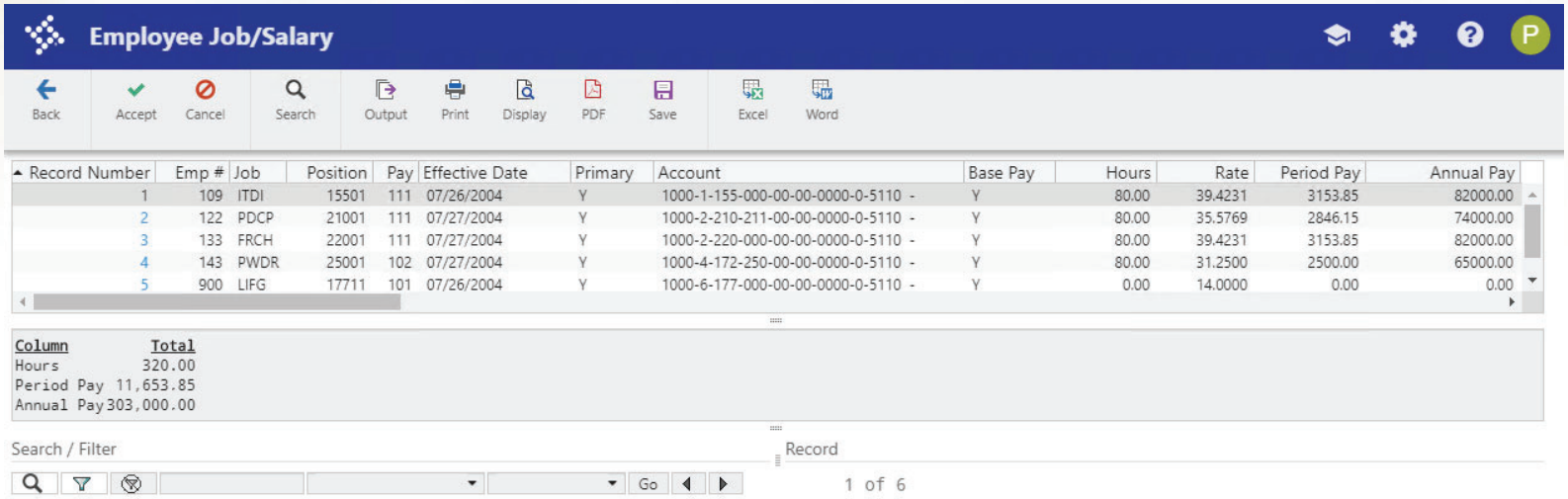
New Search Period - Specific Date



Record Number	Emp #	Job	Position	Pay	Effective Date	Primary	Account	Base Pay	Hours	Rate	Period Pay	Annual Pay
1	109	ITDI	15501	111	07/26/2004	Y	1000-1-155-000-00-00-0000-0-5110 -	Y	80.00	39.4231	3153.85	82000.00
2	122	PDCP	21001	111	07/27/2004	Y	1000-2-210-211-00-00-0000-0-5110 -	Y	80.00	35.5769	2846.15	74000.00
3	133	FRCH	22001	111	07/27/2004	Y	1000-2-220-000-00-00-0000-0-5110 -	Y	80.00	39.4231	3153.85	82000.00
4	143	PWDR	25001	102	07/27/2004	Y	1000-4-172-250-00-00-0000-0-5110 -	Y	80.00	31.2500	2500.00	65000.00
5	900	LIFG	17711	101	07/26/2004	Y	1000-6-177-000-00-00-0000-0-5110 -	Y	0.00	14.0000	0.00	0.00

Column	Total
Hours	320.00
Period Pay	11,653.85
Annual Pay	303,000.00

6 Base Pay records returned with various effective dates prior to the specified date. In this case it was 8/1/2004. Some of the records could be effective now, and therefore active, but there is no way to tell unless we examine in more detail; however they were all effective (and active) as of the specified date.

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Employee Pay - Dates

- Effective Date – **Drives the payroll process**
- Position Start and End – when position is active for this record
- Pay Start and End – formerly Start/End for pay
- Longevity Calculate – new date field specifically used for longevity calculations

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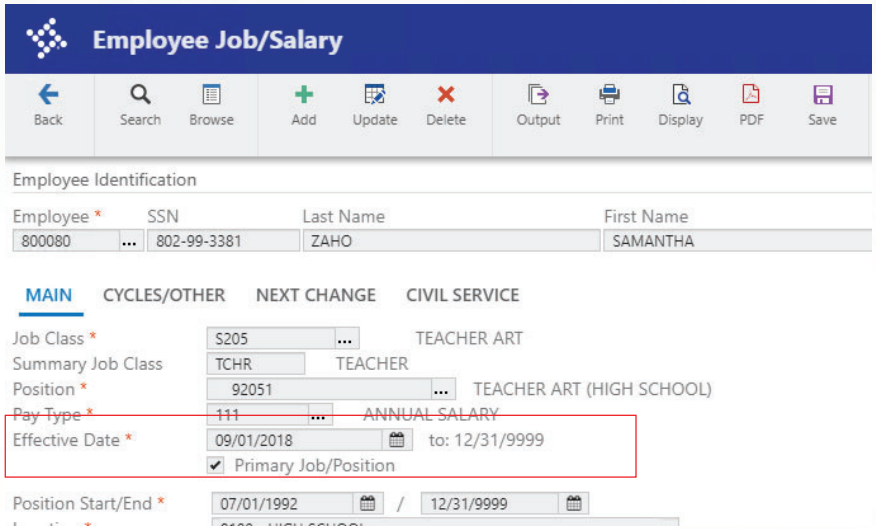
Employee Pay – Primary Job/Position Flag

- Effective date and position are now part of the key
- Primary Job/Position combination now stored at the employee pay level
- Will default in when upgrading to 2018 or higher



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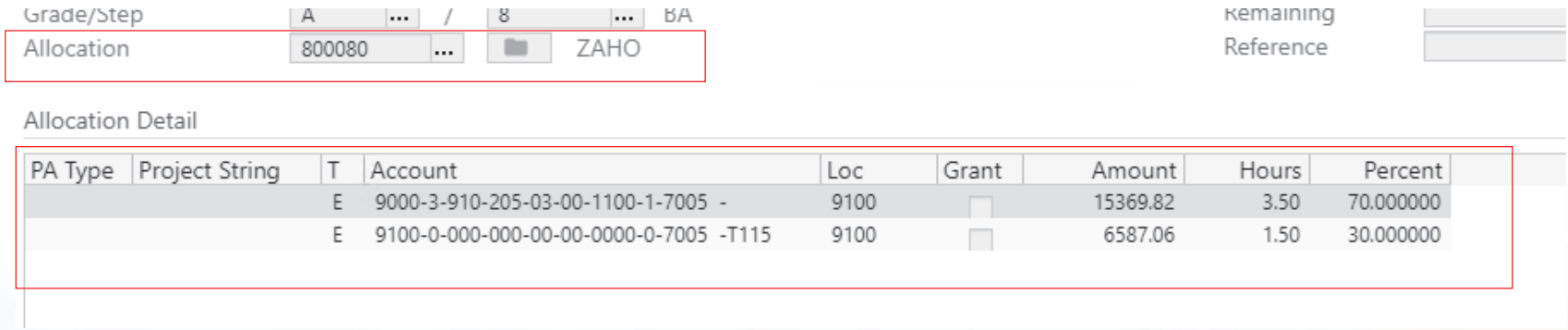
Employee Pay – Allocation Details

- All accounts viewed and maintained in one place
- Manual allocations removed
- Coded allocations can still be used as a default



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Employee Pay – Salary Tables

- Salary tables have NOT changed.
- Effective dates DO NOT have to match between Salary tables and Job Salary records.
- Effective dates DO NOT have to match between Salary tables and Position records.
- Effective dates DO NOT have to match between Job Salary and Position records.
- **Job Salary effective date is now the driving force in the payroll process.**

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Employee Pay – Duplicating vs. Adding vs. Updating

- **The Effective Date is a key field and cannot be updated.**
- Add a new record when a prior instance of the Job/Position/Pay does NOT exist.
- Duplicate when a prior instance DOES exist and the Job/Position defaults will remain the same. Duplicate allows a new effective date to be defined and duplicates all associated pays as well.
- Update when the Job/Position/Pay/Effective Date will remain the same.

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What to remember

- Main takeaways
  - Historical pays and positions
  - Future dated pays and positions
  - Improved Retroactive Pay Processing
- Evergreen

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