Salary Tables and Mass Step Increases in EERP

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Overview

Salary Tables must be created each year before performing Mass Salary Increases and Mass Salary Changes. Salary changes and contract changes are handled differently depending on whether the employees receiving the changes are attached to a Salary Table. These increases and changes can be made on a global basis or an individual basis.

The Group/BU Code and the Grade/Rank code on the employee's Job/Salary (pay) record determine which Salary Table to pull information. If multiple Salary Tables exist for the Group/BU and Grade/Rank combination, then it is the Effective Date on the pay record that determines which table is used.

The Effective Date on the pay record is compared to the Effective Date of the Salary Table and the system will use the table with an Effective Date on or before, and closest to, the Effective Date on the pay record. If multiple Salary Tables exist with the same Group/BU and Grade/Rank with Effective Dates of 07/01/2023, 07/01/2024, and 07/01/2025 and the employee's pay record has an Effective Date of 09/01/2024, then the employee will be linked to the table with the 07/01/2024 Effective Date.

Examples:

Employee Pay Effective Date	Salary Schedule Effective Date
9/1/2024	7/1/2024
5/15/2024	7/1/2023
7/1/2025	7/1/2025

Effective Dated Pays – v2019+

Prior to EERP version 2018.1, the payroll module allowed clients to create a single instance of employee pay in the active set of payroll salary records. In EERP version 2018+, EERP introduced an option that allows users to create multiple instances of the same employee pay, distinguished by the effective date. Now, an employee can be assigned a base pay for their primary job in the first few months of 2023, and then be assigned a replacement base pay after they receive a raise part way through the year. Both records can be maintained simultaneously in the Employee Job/Salary application, and EERP will know which base pay to pull salary data from within a payroll by evaluating the effective dates of the two base pays. This feature means employees can now have historical, current, and future dated Job Salary records. **This means you no longer must wait until the final payroll of the fiscal year to create Job Salary records for the new fiscal year.**

More information can be found in the 'Effective Dated Pays and Positions' document found using Tyler Search through the Tyler Support website.

Adding a Salary Table

Salary tables can be added when a new one is needed. This is accomplished by simply defining the criteria for the table and adding the amounts.
Human Capital Management >Human Resources >Position Control and Budgeting >Salary Tables

The following screenshot shows a new table that was added for certified personnel:

Note: Updates to the Job Class Master record(s) may be necessary when new tables are added. Review the Min/Max Grade/Step on the Salary Data tab of the Job Class Master to verify if changes are needed.

Maintaining Salary Table

If an employee is attached to a Salary Table, then their pay amounts are pulled from that table. If an employee is getting a pay increase, then logic follows that it comes from the Salary Table where those new amounts are keyed.

Salary Table amounts can be changed in one of three ways-

1. Manually update the current Salary Table amounts
2. Copy the current table to a new table
3. Generate a new table

Note: Kentucky school districts generally use the third option, **Generate a New Table**. If your district utilizes the Generate option, skip to the Generate section of this document.

Manually Updating

Salary Table amounts can be changed by simply choosing the Update icon on the existing Salary Table. This will allow you to change the amounts on each Step of the table. The drawback to this method is that, as you key the new rates, you are erasing the old rates and leaving no record of the previous amounts behind. This method is not recommended for KY School Districts. This method can, however, be used if a mistake has been made when setting up a new table.

Human Capital Management >Human Resources >Position Control and Budgeting >Salary Tables

Copy

The **Copy** option allows you to make a copy of the current Salary Table and assign it to a new Effective Date. Once the new table is created, you would choose the Update icon and key the new rates. The advantage of this option is that you retain a historical record of the old rates. The disadvantage is that the new amounts for each step of the table must be manually calculated and keyed.

Once **Copy** is chosen, you are brought to the new table and required to key a new Effective Date:

Once the new Effective Date is in place, choose the Update icon to update the salary amounts.

Generate

The menu option **Generate** offers the most automation and is the more popular choice for maintaining Salary Table amounts. The **Generate** functionality allows you to create multiple tables at one time and will make all the calculations for you. This method is recommended when creating salary tables for a new fiscal year.

Choosing **Generate** brings you to the following screen:

Define Criteria Explanations:

Base: The base date is the current effective date of the table(s) that is being increased.

Effective: The effective date of the table that will reflect the new rates.

Group/BU and Grade/Rank Range: Specify the Group/BU and the Grade/Ranks to increase. All Grade/Ranks under a specific Group/BU can be generated simultaneously by leaving this range "open" (blank to zzzz).

Change By Amount/Percentage: One or both of the fields can be populated with a figure to increase by.

Whichever is (less/more): If both a Flat Amount *and* a Percentage are specified in the preceding fields the system will use the amount that is less or the amount that is more, depending on what is defined here.

Diagonal Increase: This functionality is only used in Salary & Benefit Projections. If this field is checked, the system will first apply the percentage increase to the existing step. It then moves all levels up one (so the amount in Step 0 is now in Step 1 and the amount in Step 1 is now in Step 2, etc.). The new Step 0 amount is calculated by the system using the ratio of Step 1 to Step 0.

Round Increase: If checked, the salary amounts are rounded *before* the increase is calculated. Calc Codes 01 through 04, 21, and 31 are rounded two decimal points. The remaining Calc Codes are rounded to the nearest dollar. If the amount is less than $0.50, the amount is rounded down. If $0.50 or more, the amount is rounded up.

 Note: The salary amount that the system is applying the amount or percent *to* is determined by the Calc Code specified in the table. For example, if the table has a Calc Code of 02, it will apply the increase to the hourly rate because it is an hourly Calc Code. Once the hourly rate is increased, the rest of the amounts are calculated according to the new hourly rate.

Once the **Generate** screen is defined, implement the changes by selecting **Execute**. A message will display at the bottom of the screen that will tell you how many tables have been added.

Close the **Generate** screen and perform a **Search** to see the newly created tables. You will note that the system inserts a message in the **Comments** field to indicate that changes were made to the table.

Mass Step Increase

Once the new tables are in place, it is time to link these new tables to the employee pay records. This is accomplished in one of several ways, depending on the increase scenario.

If employees are receiving Step increases in addition to the amount/percent increase then the link can be made through the **Mass Step Increase** program. The **Mass Step Increase** program performs two essential functions- it increases the Step level on the employee's pay record by one and it changes the Effective Date on the employee's pay record. It is the Effective Date change that links the employee to the new table.

The Mass Step Increase program is found on the End of Period menu.

Human Capital Management >Payroll >End of Period >Mass Salary Changes >Mass Step Increases

Define Criteria Explanation:

Effective Date: This field is typically populated with the Effective Date that was used on the Salary Table.

Location/Org/Group BU/Job Class/Position/Pay Type/Calendar: The options available for selection criteria.

Next Date: The 'Next Date' fields are used only for employees that receive their step increase by Anniversary date. The date range entered here is used to select employees, based on the Next Change date on the Next Change tab of the employee's base pay record in Job/Salary. These fields would be used in conjunction with a Step Increase Basis Option 2- Current Salary + 1 year, which would increment the Effective Date on the pay record by 1 year.

Exclude Pay Status: Check the boxes of the status choices you want to exclude from the Step Increase.

Started Job Before: The date in this field is compared to the Start Date on the employee's base pay record. For the employee to be eligible for a step increase, the Start Date must be before the date entered in this field. If all employees should get a step increase, enter the date used for the Effective Date (start of the new fiscal year).

Minimum Days Worked/in Year/by & Minimum Hours Worked/If over step/Min Hours Worked: If employees must work a minimum number of days or hours in the fiscal year to be eligible for the

step increase, these fields can be populated. To utilize this functionality, you must be tracking Days Worked by Job.

Step Increase Basis: In most cases, the Increase Basis should be 1- Effective Date.

Sort Report By: This is the sort order of the proof report. The proof report can be sorted by Employee Name, Employee Number, Location/Org/Employee Name, Loc/Name, or Job/Loc/Name.

PM Action Code: If an Action Code is populated, EERP will create a record of the increase in the Actions History program.

Impact Longevity: This field works in conjunction with the Days Worked functionality. If an employee has not worked enough days during the year to meet the criteria defined in the 'Minimum Days Worked' field, then the employee's longevity 'months of service' calculation will be reduced by 1 year (12 months).

Active Employees Only: Checkmark this field to process only those employees with a Status of Active in the Employee Master.

Print Separate Error Report: If an employee will not receive a Step Increase, an error message displays in the Message column of the proof report. If this field is check-marked, you will receive one proof report for all employees that will successfully step and one proof report for those employees with an error message in the Message column, providing one list of all employees within the selection criteria that will not receive an increase.

No Increase tab: Defining the information on this tab allows you to restrict an employee's step increase based on the number of grievances against them in a specified period of time. To utilize this functionality, you must be tracking grievances through the EERP Employee Grievance programs.

The Mass Step Increase program is a proof-post program.

Crucial: Carefully review the proof before updating the changes as there is limited functionality to delete the changes on a global basis once they have been implemented. You may find this task less intimidating by running the process multiple times, using the available selection criteria to narrow down the number of employees in each process. For instance, Define one Job Class code or a range of Job Class codes at a time.

Mass Contract Changes

The Mass Contract Changes option provides a way to set employee Job/Salary records back to the defaults that are on the Salary Tables. This functionality will reset the number of pays, days, salary amounts, etc. This is useful when you have multiple mid-year hires whose records need to be

updated to reflect a full year's salary. It's also used when the number of days per year or hours per year has changed on the new salary tables.

Human Capital Management >Payroll >End of Period >Mass Salary Changes >Mass Contract Changes

Select **Define** and enter the criteria needed for the contract changes.

The **Mass Contract Changes** program is a proof-post program. Select **Output Post** after the define criteria has been entered.

Crucial! Carefully review the proof before updating the changes as there is no way to undo all changes on a global basis once they have been implemented. You may find this task less intimidating by running the process multiple times, using the available selection criteria to narrow down the number of employees in each process. For instance, Define one Job Class code or a range of Job Class codes at a time.

Define Criteria Explanations:

Location/Org/Group BU/Job Class/Position/Pay Type/Calendar/Next Date: The fields available for use in defining the selection criteria.

Exclude Pay Status: Check the boxes of the status choices you want to exclude from the Step Increase.

Started Job Before: The date in this field is compared to the Start Date on the employee's base pay record. For the employee to be eligible for a contract increase, the Start Date must be before the date entered in this field. If all employees should get a contract increase, enter the date used for the Effective Date.

Minimum Days Worked/in Year/by & Minimum Hours Worked/If over step/Min Hours Worked: If employees must work a minimum number of days or hours in the fiscal year to be eligible for the contract increase, these fields can be populated. To utilize this functionality, you must be tracking Days and Hours Worked by Job.

Change (Increase) Option: In this scenario, the increase option should be 1- New Contract Rates. The other available options are 2- New Rates from Next Pay Column, 3- Percentage Increase, and 4- Global Recalc.

*Note: The most common option used in Kentucky School Districts is **1-New Contract Rates**.*

Percentage Rate: This field is only available when the Increase Option is 3- Percentage Increase.

Effective Date: This field is typically populated with the Effective Date that was used on the Salary Table.

Rounding Method: This field is only available when the Increase Option is 3- Percentage Increase.

Report Sort Order: This is the sort order for the proof report. The report can be sorted by Employee Name, by Employee Number, or by Location/Org/Employee Name.

Salary Table Defaults: When changes other than salary amounts are made to the Salary Table, this field allows the option of making these changes to the employee pay records as well. For example, perhaps the Days/Year for the upcoming fiscal year will change. If the Days/Year field was changed on the salary table, checking the Salary Table Defaults field on the Mass Contract Increase would update the Days/Year field on all of the applicable Job/Salary records. This will also reset the Num Pays field on the Job/Salary record for employees who were hired mid-year.

Active Emps Only: Check this field to process only those employees with a Status of Active in the Employee Master.

Include Off-Step/Frozen Employees: Check this field to process employees whose Job/Salary records have an Off-Step or Frozen status. The employees will be listed on the report that is generated during the Output/Post process. No changes are made to the employee records.

Update Frozen Employee Salary: Check this field to process employees whose Job/Salary records have a Frozen status. This check box is not available if the Include Off-Step/Frozen Employees box above is not selected. Employee Job/Salary records with Frozen in the Off-Step/Frozen field will be updated.

Allow Salary Decrease: Check this field to allow for the processing of salary decreases.

Allow Salary to Exceed Maximum: This field indicates that the employee salaries should be allowed to exceed the pay band maximum.

Increase Salary to Minimum: This field indicates that employee salaries that fall below the minimum should be increased to the pay band minimum.

PM Action Code: If an Action Code is populated, EERP will create a record of the increase in the Actions History program.

Manual Job/Salary Record Changes When Salary Tables Are Used

If an employee is Off-Step or if only random employees are receiving a Step and/or amount/percent increase, then the changes must be made manually. This is accomplished by updating the employee's Job/Salary record.

If the employee just needs to be attached to a new Salary Table with the same Grade name, update the Effective Date to match the Effective Date of the new table. If the employee also needs to receive a step increase, increment the Step.

Manually key the applicable amount if the employee is Off-Step or receiving a salary that is not on the Salary Table. Once the amounts are keyed, the Off-Step/Frozen field is automatically set to 'Off-Step', if it wasn't previously set to this option. This field can be updated to reflect what type of change is being made.

Examples (choose from drop-down box):

1. The employee is being set to a *Frozen* salary amount.
2. The change is an *Adjustment* to the salary.
3. *Mid-Year* can be used to identify the employee as being hired mid-year.