Change Contract Types Mid Year

Contract Types are created to identify the number of days an employee will work, the number of checks the employee will receive during a fiscal year, the percent of the day the employee performs this duty, and how the pay is to be taxed during each pay period of the fiscal year.

If any employee changes positions (duties) during the school year and the contract type is different than the current position that they currently hold, then:

> Original position(s) will need to be terminated
> Old contract updated to reflect correct number of contract days and contract period
> New contract type added for new position
> New position(s) added

Finance > HR > Staff Manager

Terminate all current positions

Find the employee to be updated and click the

Click the **4 Positions(s)**

This employee has three positions that are calculated. The Bus Aide Position below is not a calculated position.

Click on the next to the first calculated position.

The screen will show all the paydates for the contract year selected.

	Scheduled	Payroll Period	Pay Date	Post Date	☐ Scheduled Amount	Actual Amount
☑	Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$2,800.50	$2,800.50
☑	Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$2,800.50	$2,800.50
☑	Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$2,800.50	$2,800.50
☑	Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$2,800.50	$2,800.50
☑		01/01/2015-01/31/2015	1/31/2015	1/31/2015	$2,800.50	
☑		02/01/2015-02/28/2015	2/28/2015	2/28/2015	$2,800.50	
☑		03/01/2015-03/31/2015	3/31/2015	3/31/2015	$2,800.50	
☑		04/01/2015-04/30/2015	4/30/2015	4/30/2015	$2,800.50	
☑		05/01/2015-05/31/2015	5/31/2015	5/31/2015	$2,800.50	
☑		06/01/2015-06/30/2015	6/30/2015	6/30/2015	$2,800.50	
☑		07/01/2015-07/31/2015	7/31/2015	7/31/2015	$2,800.50	
☑		08/01/2015-08/31/2015	8/31/2015	8/31/2015	$2,800.50	

Uncheck all paydates except for the current payroll period that the payoff will be included in.

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☑ Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$2,800.50	$2,800.50
☑ Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$2,800.50	$2,800.50
☑ Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$2,800.50	$2,800.50
☑ Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$2,800.50	$2,800.50
☑	01/01/2015-01/31/2015 ← current pay period	1/31/2015	1/31/2015	[calculated on save]	
☐	02/01/2015-02/28/2015	2/28/2015	2/28/2015		
☐	03/01/2015-03/31/2015	3/31/2015	3/31/2015		
☐	04/01/2015-04/30/2015	4/30/2015	4/30/2015		
☐	05/01/2015-05/31/2015	5/31/2015	5/31/2015		
☐	06/01/2015-06/30/2015	6/30/2015	6/30/2015		
☐	07/01/2015-07/31/2015	7/31/2015	7/31/2015		
☐	08/01/2015-08/31/2015	8/31/2015	8/31/2015		

Save   Cancel

Select 🖫 **Save**

Click on the 🖹 next to the second calculated position.

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports

Return to list

Positions :	** 8/18/2014 - 6/1/2015	Return to Contract List

....

Positions   ➕ Add Position

Page Size: 10 ▾ Calendar: All Calendars ▾

System ID	Calendar	Name	PAC/DE	Coding	Calculation	Actions
5150	Standard Calendar	Bus Aide - Reg Ed Substitute	79 / Y	199-34-6129.00-999-?-99-1-00	0.00% @ 25.00 per day	🖹 ❌
3457	Standard Calendar	Elem Teacher - Reg Ed	80 / N	199-11-6119.00-101-?-11-0-00	90.00% @ 37,340.00 per year	🖹 ❌
2337	Standard Calendar	Elem Teacher - State Comp	80 / N	199-11-6119.00-101-?-24-0-00	10.00% @ 37,340.00 per year	🖹 ❌
5144	Standard Calendar	HB3646 Elem	80 / N	199-11-6119.00-101-?-11-0-00	100.00% @ 806.00 per year	🖹 ❌
Records: 4					Page 1 of 1 ▾	

The screen will show all the paydates for the contract year selected for the second position.

Scheduled Payments

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☑ Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$311.17	$311.17
☑ Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$311.17	$311.17
☑ Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$311.17	$311.17
☑ Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$311.17	$311.17
☑	01/01/2015-01/31/2015	1/31/2015	1/31/2015	$311.17	
☑	02/01/2015-02/28/2015	2/28/2015	2/28/2015	$311.17	
☑	03/01/2015-03/31/2015	3/31/2015	3/31/2015	$311.17	
☑	04/01/2015-04/30/2015	4/30/2015	4/30/2015	$311.17	
☑	05/01/2015-05/31/2015	5/31/2015	5/31/2015	$311.17	
☑	06/01/2015-06/30/2015	6/30/2015	6/30/2015	$311.17	
☑	07/01/2015-07/31/2015	7/31/2015	7/31/2015	$311.17	
☑	08/01/2015-08/31/2015	8/31/2015	8/31/2015	$311.13	

[Save] [Cancel]

Uncheck all paydates except for the current payroll period that the payoff will be included in.

Scheduled Payments

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☑ Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$311.17	$311.17
☑ Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$311.17	$311.17
☑ Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$311.17	$311.17
☑ Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$311.17	$311.17
☑	01/01/2015-01/31/2015 ← current pay period	1/31/2015	1/31/2015	[calculated on save]	
☐	02/01/2015-02/28/2015	2/28/2015	2/28/2015		
☐	03/01/2015-03/31/2015	3/31/2015	3/31/2015		
☐	04/01/2015-04/30/2015	4/30/2015	4/30/2015		
☐	05/01/2015-05/31/2015	5/31/2015	5/31/2015		
☐	06/01/2015-06/30/2015	6/30/2015	6/30/2015		
☐	07/01/2015-07/31/2015	7/31/2015	7/31/2015		
☐	08/01/2015-08/31/2015	8/31/2015	8/31/2015		

[Save] [Cancel]

Select 💾 **Save**

Click on the 🖊 next to the third calculated position.

The screen will show all the paydates for the contract year selected for the third position.

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☑ Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$67.17	$67.17
☑ Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$67.17	$67.17
☑ Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$67.17	$67.17
☑ Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$67.17	$67.17
☑	01/01/2015-01/31/2015	1/31/2015	1/31/2015	$67.17	
☑	02/01/2015-02/28/2015	2/28/2015	2/28/2015	$67.17	
☑	03/01/2015-03/31/2015	3/31/2015	3/31/2015	$67.17	
☑	04/01/2015-04/30/2015	4/30/2015	4/30/2015	$67.17	
☑	05/01/2015-05/31/2015	5/31/2015	5/31/2015	$67.17	
☑	06/01/2015-06/30/2015	6/30/2015	6/30/2015	$67.17	
☑	07/01/2015-07/31/2015	7/31/2015	7/31/2015	$67.17	
☑	08/01/2015-08/31/2015	8/31/2015	8/31/2015	$67.13	

Uncheck all paydates except for the current payroll period that the payoff will be included in.

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☑ Batch #694	09/01/2014-09/30/2014	9/15/2014	9/15/2014	$67.17	$67.17
☑ Batch #700	10/01/2014-10/31/2014	10/15/2014	10/15/2014	$67.17	$67.17
☑ Batch #705	11/01/2014-11/30/2014	11/14/2014	11/14/2014	$67.17	$67.17
☑ Batch #708	12/01/2014-12/31/2014	12/15/2014	12/15/2014	$67.17	$67.17
☑	01/01/2015-01/31/2015 current pay period	1/31/2015	1/31/2015	[calculated on save]	
☐	02/01/2015-02/28/2015	2/28/2015	2/28/2015		
☐	03/01/2015-03/31/2015	3/31/2015	3/31/2015		
☐	04/01/2015-04/30/2015	4/30/2015	4/30/2015		
☐	05/01/2015-05/31/2015	5/31/2015	5/31/2015		
☐	06/01/2015-06/30/2015	6/30/2015	6/30/2015		
☐	07/01/2015-07/31/2015	7/31/2015	7/31/2015		
☐	08/01/2015-08/31/2015	8/31/2015	8/31/2015		

Select ![Save icon] **Save**

Click on ![icon] **Return to Contract List**

➡️ **Terminate the current contract**

That step will bring you back to this screen. Click on the ![icon] .

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports				

Return to list

...

Employment Contracts ⊕ Add Contract

Page Size: 10 ▾ Period: Current Period ▾ District: All Districts ▾ Filter: Active Contracts ▾

System ID	Period	District	Contract Dates	Days	% of Day	Positions	Actions
5123	2014-2015		8/18/2014 - 6/1/2015	187	100%	🔍 4 Position(s)	![icon]

Records: 1 ⊗ ⊙ Page 1 of 1 ▾ ⊙ ⊗

This will bring up the current contract information for the employee.

Contract Terms

Contract Type*	10 Month - 187 Days ▾
Contract Days*	187
Contract Begin*	8/18/2014 📅
Contract End*	6/1/2015 📅
Status*	* - Active ▾

Change the contract days to reflect the actual number of days that the employee worked for this contract including any paid leave days. (personal leave, paid holidays etc)

Select 🖫 **Save**

➡ **Enter NEW Contract**

Click on ⊕ **Add Contract**

►**Contract Type** – Select the appropriate contract type from the drop down menu
►**District** – Select the appropriate district from the drop down menu
►**Instructional Period** – Select the appropriate instructional period from the drop down menu
►**Contract Type** – Select the appropriate contract type from the drop down menu
►**Contract Days** – Enter the number of contract days the employee will actually work on this contract type.
►**Contract Begin** – Enter the effective date of the contract.
►**Contract End** – Enter the last day the contract is effective.
►**Status** – Select the appropriate status from the drop down box
►**Primary Role** – Select the appropriate position type from the drop down box
►**Percent of Day** – Enter the percent of the day the employee will perform on this contract

►**Pay Step** – Enter the pay step of the employee
►**Local Experience** – Enter the number of years employee has been at the district.
►**Prof. Experience** – Enter the number of years of professional experience (from service record)
►**Statutory Tax Status** – Select the eligible taxes for employee from drop down
►**FUTA** – Select TRUE or FALSE if employee is eligible for FUTA
►**SUTA** – Select TRUE or FALSE if employee is eligible for SUTA
►**Overtime Exempt** – Select TRUE or FALSE if employee is eligible for overtime.

Employment Contract	
Contract Type*	FTE
District*	
Instructional Period*	2014-2015 School Year
Contract Terms	
Contract Type*	12 Month - 226 Days
Contract Days*	104
Contract Begin*	01/11/2015
Contract End*	06/30/2015
Status*	* - Active
Contract Attributes	
Primary Role*	Program Administrator
Percent Of Day*	100
Pay Step*	10
Local Experience*	6
Prof. Experience*	10
Payment Attributes	
Statutory Tax Status*	State Retirement and Medicare Eligible
FUTA Exempt*	False - FUTA Taxes apply to this employee
SUTA Exempt*	False - SUTA Taxes apply to this employee
Overtime Exempt*	True - Employee IS NOT eligible for overtime

Save   Cancel

Select Save

Enter NEW Payroll Position

That step will bring you back to this screen. Click on 🔍 **0 Position(s)**

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports				

📋 Return to list

...

Employment Contracts ⊕ Add Contract

Page Size: 10 ▼ Period: Current Period ▼ District: All Districts ▼ Filter: Active Contracts ▼

System ID	Period	District	Contract Dates	Days	% of Day	Positions	Actions
5248	2014-2015		1/11/2015 - 6/30/2015	104	100%	🔍 0 Position(s)	📋 ❌
5123	2014-2015		8/18/2014 - 1/10/2015	187	100%	🔍 4 Position(s)	📋

Records: 2   ◀◀ ◀ Page 1 of 1 ▼ ▶ ▶▶

Click on ⊕ **Add Position**

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports	

📋 Return to list

Positions :   * 1/11/2015 - 6/30/2015   ↩ Return to Contract List

....

Positions   ⊕ Add Position

Page Size: 10 ▼ Calendar: All Calendars ▼

System ID	Calendar	Name		PAC/DE	Coding	Calculation	Actions

No Positions Found

Records: 0   ◀◀ ◀ Page 1 of 1 ▼ ▶ ▶▶

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports	

📋 Return to list

Positions :   ** 1/11/2015 - 6/30/2015   ↩ Return to Contract List

....

Position Details

Payroll Calendar* Select a calendar... ▼

Name* [_____]

Position Type* Select an position type... ▼

Payroll Activity Code* Select an activity code... ▼

WC Category* Select a category... ▼

Allocation* [_____]

Compensation Type* Select a Compensation Type... ▼

Rate* [_____]

Exempt From Dock* False - Wages earned from the position are used to calculate dock rate ▼

Straight Time Mask* 101 ▼ - 00 ▼ - 6112 ▼ . 00 ▼ - 000 ▼ - ? ▼ - 00 ▼ - 0 ▼ - 00 ▼ ☑ Use for O/T as well

Scheduled Payments

No Payroll Periods

WARNING: The payroll calendar is $position.PayrollCalendar.PayrollCalendarType however $scheduledPaymentCount periods are available

💾 Save   ⊘ Cancel

►**Payroll Calendar** – Select Standard Calendar in the drop down menu
►**Name** – Description of the new position. This will be the description on check
►**Position Type** – Select the appropriate position type for the position that is being added.
►**Payroll Activity Code** – Select the appropriate payroll activity code for the position that is being added from drop down menu
►**Workers Comp** – Select the appropriate WC category for the position that is being added from the drop down menu
►**Allocation** – Enter in percentage of the day the employee will perform this position.
►**Compensation Type** – Select the appropriate compensation type for the position that is being added from the drop down menu.
►**Rate** – Enter the total salary for this position. (as if the employee worked the entire year)
►**Exempt from Dock** – Select if the position should be used to calculate the dock rate
►**Straight time Mask** – Enter the code to be used for the position that is being added.
►**Use for O/T as well** – Check this box if you want to use the same expense code for any overtime for this position.

| Demographics | Payroll | HR Info | Leave | Contact Info | Certifications | Documents | Reports |

Positions :   ** 1/11/2015 - 6/30/2015   Return to Contract List

Position Details

Payroll Calendar*	Standard Calendar
Name*	Special Ed Director
Position Type*	Program Administrator
Payroll Activity Code*	80 - Base Salary
WC Category*	Professional
Allocation*	100.00
Compensation Type*	Administrative Range
Rate*	55,112.00
Exempt From Dock*	False - Wages earned from the position are used to calculate dock rate
Straight Time Mask*	199 - 21 - 6119 . 00 - 999 - ? - 23 - 0 - 00 ☑ Use for O/T as well

Once the Payroll calendar is selected on the above screen the scheduled payments will propagate through the end of the contract period for this employee. ✓ all payroll periods that you want this stipend to be paid in. (For this instance I have selected the stipend to come out of every remaining check.)

Scheduled Payments

Scheduled	Payroll Period	Pay Date	Post Date	Scheduled Amount	Actual Amount
☐ Batch #676	07/01/2014-07/31/2014	7/31/2014	7/31/2014		Not Paid
☐ Batch #682	08/01/2014-08/31/2014	8/31/2014	8/31/2014		Not Paid
☐ Batch #694	09/01/2014-09/30/2014	9/30/2014	9/30/2014		Not Paid
☐ Batch #700	10/01/2014-10/31/2014	10/31/2014	10/31/2014		Not Paid
☐ Batch #705	11/01/2014-11/30/2014	11/30/2014	11/30/2014		Not Paid
☐ Batch #708	12/01/2014-12/31/2014	12/31/2014	12/31/2014		Not Paid
☑	01/01/2015-01/31/2015 ← current pay period	1/31/2015	1/31/2015	[calculated on save]	
☑	02/01/2015-02/28/2015	2/28/2015	2/28/2015	[calculated on save]	
☑	03/01/2015-03/31/2015	3/31/2015	3/31/2015	[calculated on save]	
☑	04/01/2015-04/30/2015	4/30/2015	4/30/2015	[calculated on save]	
☑	05/01/2015-05/31/2015	5/31/2015	5/31/2015	[calculated on save]	
☑	06/01/2015-06/30/2015	6/30/2015	6/30/2015	[calculated on save]	

WARNING: The payroll calendar is $position.PayrollCalendar.PayrollCalendarType however 12 periods are available

Save   Cancel

Select 🖫 **Save**

| Demographics | Payroll | HR Info | Leave | Contact Info | Certifications | Documents | Reports |

Return to list

Positions : ** 1/11/2015 - 6/30/2015   Return to Contract List

....

Positions   new position   ⊕ Add Position

Page Size: 10 ▾ Calendar: All Calendars ▾

System ID	Calendar	Name	PAC/DE	Coding	Calculation	Actions
7709	Standard Calendar	Special Ed Director	80 / N	199-21-6119.00-999-?-23-0-00	100.00% @ 55,112.00 per year	🖉 ❌

Records: 1   Page 1 of 1 ▾

➡ Once you create payroll batch the employee from the steps above will look like the below screen shot. You will see the three payoffs for the terminated positions and a new calculation for the new position.

Finance > Payroll > Processing > Payroll Batches

Positions / Supplements - Live Check	Edit Time / Days	Overtime	Rate	⊕ Earnings	Actions
Bus Aide - Reg Ed Substitute (0.00%)	Days: 0.00	N/A	$25.00	$0.00	
Elem Teacher - Reg Ed (90.00%)	Scheduled $5,331.43	N/A		$5,331.43	
Elem Teacher - State Comp (10.00%)	Scheduled $592.37	N/A	3 terminated	$592.37	
HB3646 Elem (100.00%)	Scheduled $127.85	N/A	$806.00	$127.85	new position
Special Ed Director (100.00%)	Scheduled $4,226.88	N/A	$55,112.00	$4,226.88	

The payroll batch will:

     Calculate the payoff for the terminated postion(s)
     Calculate the monthly for the new positon.