Payroll Fiscal Year End

Rolling Paylines

Presented by: Rhonda Ramirez
Purpose of Webinar

To review the processes available for districts to roll Paylines to the new Fiscal Year
Topics Overview

• What is payline rolling?
• What are the choices for payline rolling?
• What is the standard order?
• Things to be aware of
• Launching the Copy Paylines job
• Using the Presets
• Rolling by individual paytype
• Live demonstration in our test environment
• Need help?
What is payline rolling?

• Payline Rolling is simply copying an existing payline in the current Fiscal Year (source), over to the new Fiscal Year (target).
What are the choices for payline rolling?

• Presets
  – Standard Order

• Custom
  – By Pay Type
What is the standard order?

• 1-NML L NO BEN
• 2-NML HD NO BEN
• 3-CSH CSHR
• 4-OTHER ACTIVE L
• 5-OTHER ACT HD
• 6-BEN ONLY
Things to be aware of

• If driving payroll from Position Control, use PL0402 process first.

• A payline can only be rolled once.

• If paylines rolled early, they must be maintained in both years.

• All payroll staff out of the Payroll screens during roll process.
Launching the Copy Paylines job
Navigate to HR Report/Job Selector
- Select Show Jobs
- Change Category to PAY
- Click on Copy Paylines
Using the Presets
Click on Retrieve Preset icon

- Click on Preset
• Click on Custom selection Tab

• Change Report Title XX=Dist #

• Run in Report Only Mode (default)

• Click on Submit icon
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**PERCENT**  
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0.00% **TOTALS**  
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• Review report
- Change Run Mode to Update/Report
- Click on Submit icon
- Paylines are now copied to next Fiscal Year
Rolling by individual paytype
• Use preset #1 and click on Optional Data tab
- On the **Optional Data** tab, **remove** existing Pay Type, Pay Schedule and Rate Type values.
• Enter Pay Types needed and set the drop down to “I” for Include.
• Click back on the **Required Data** tab, and make sure Run Mode is set to Report Only.

• Click on the submit icon.
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Live Demo
Need help?

• Open Lab- come in for a demo and open lab session in our test environment. Classes on Access Point.

• Remote session- enter service request for a 30 minute remote session.

• For additional help, please enter a service request on Access Point at: https://accespoint.sccoe.org
Thank You!