Santa Clara County Office of Education

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
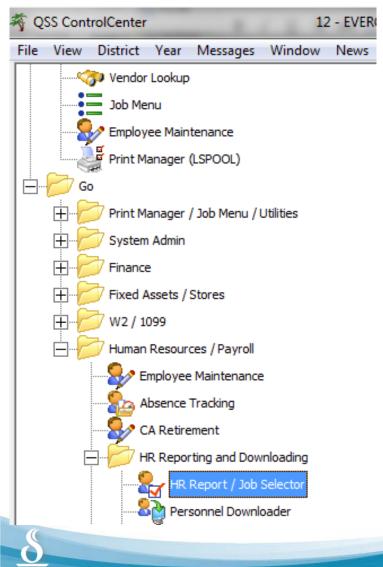- Custom
  - By Pay Type

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

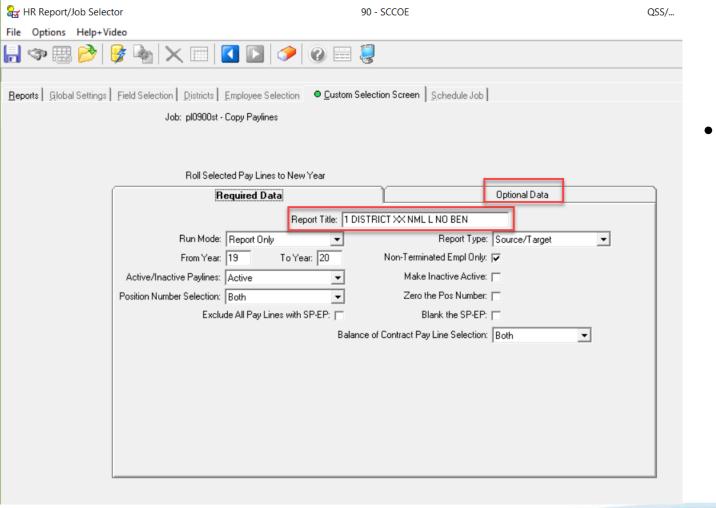- Review report

- 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.

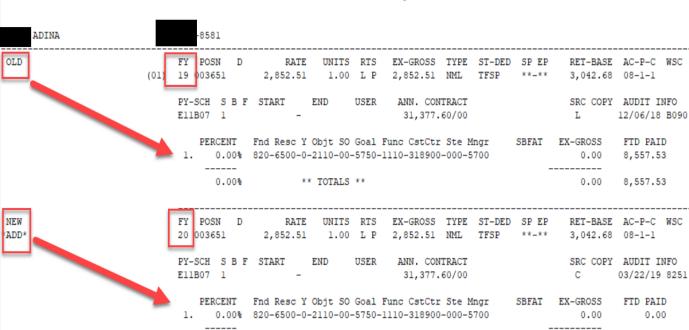- Click back on the **Required Data** tab, and make sure Run Mode is set to Report Only.

- Click on the submit icon.

- Review report

- Change Run Mode to Update/ Report
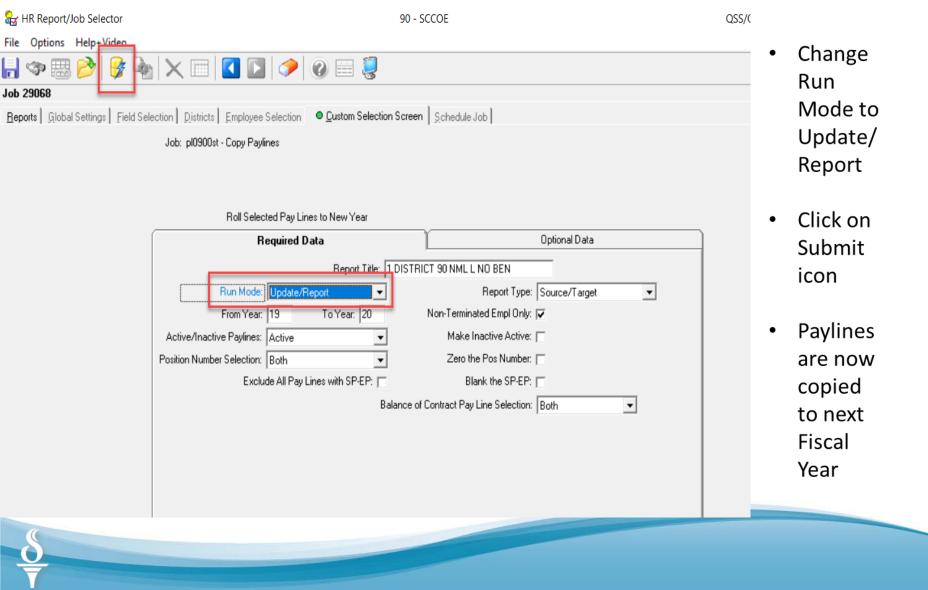
- Click on Submit icon

- Paylines are now copied to next Fiscal Year

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!