WELCOME TO

CONNECT

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E L I M I N A T I N G K E Y S T R O K E S

Time Saving Processes in HR

Lisa Wuersig

Sr. Implementation Consultant

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“Workaholics aren't heroes. They don't save the day, they just use it up. The real hero is home because they figured out a faster way.” - *Jason Fried*

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Working Smarter

- Short Cuts

- Imports

- Calculation Processes

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Short Cuts

- Quick ways to enter dates
- What security permission is this?
- Add a value to a validation set without leaving your entry page
- Set defaults to see the information you use the most

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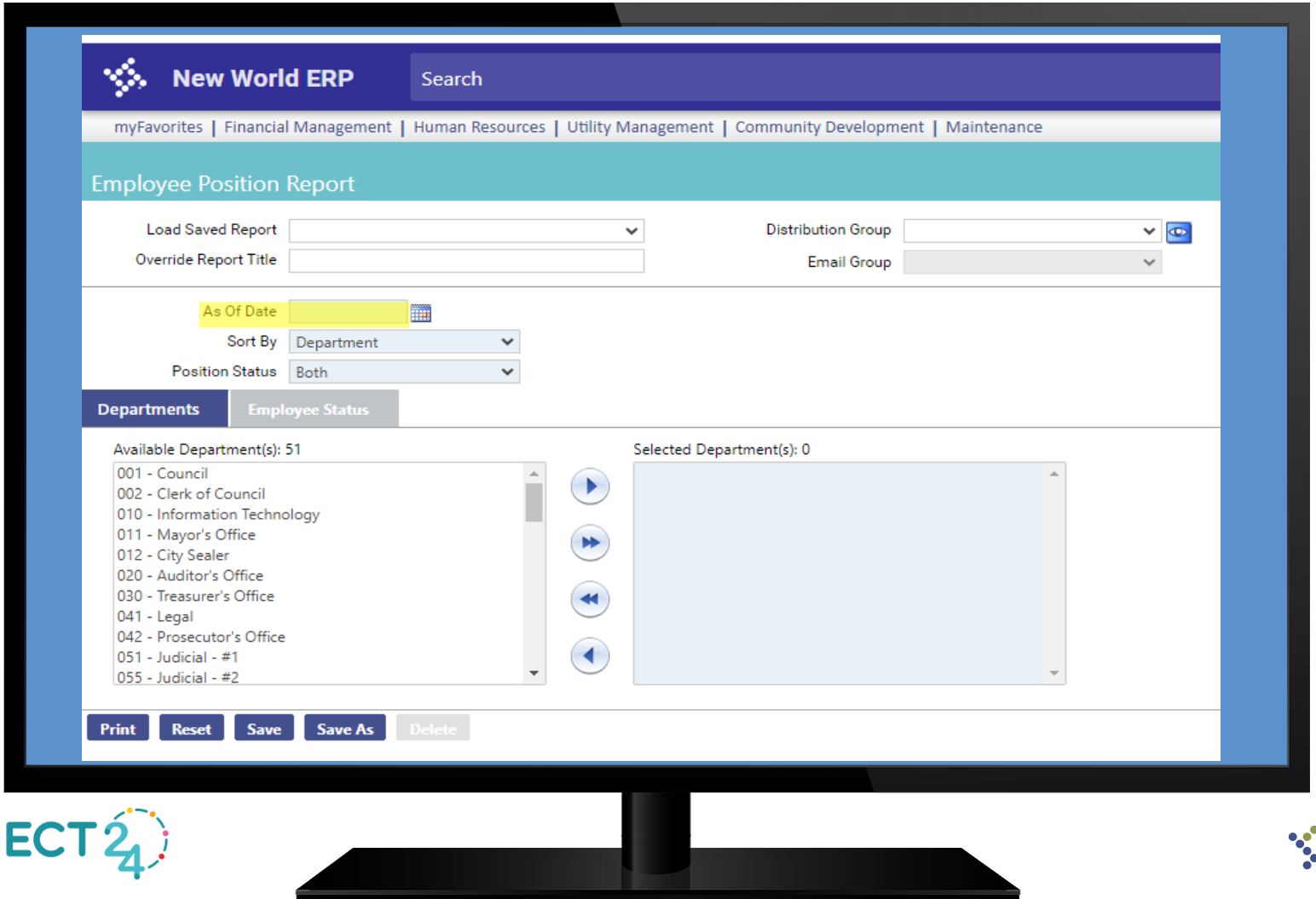

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Want Today's Date???

Simply click the letter

"T"

on your keyboard!

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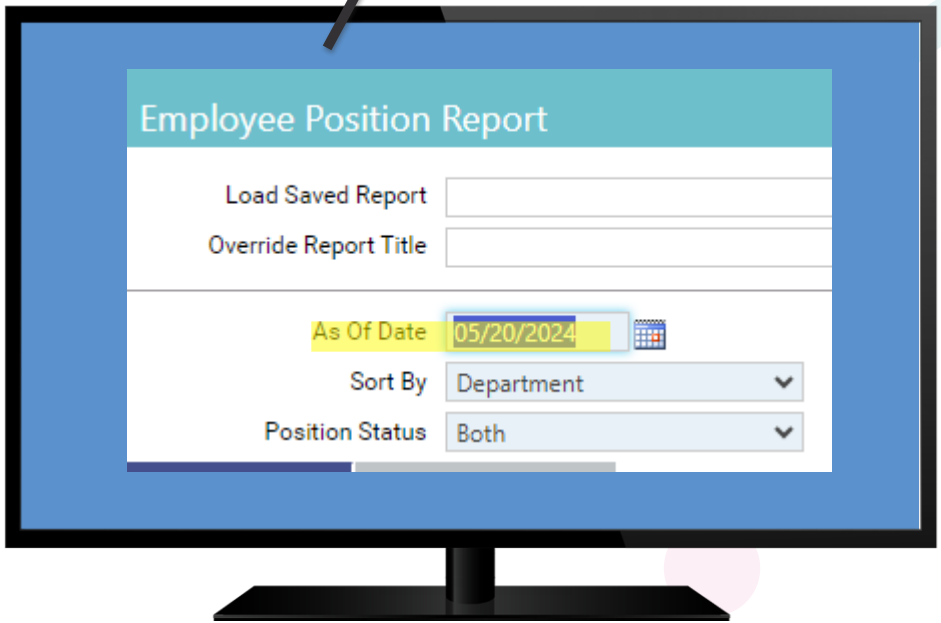

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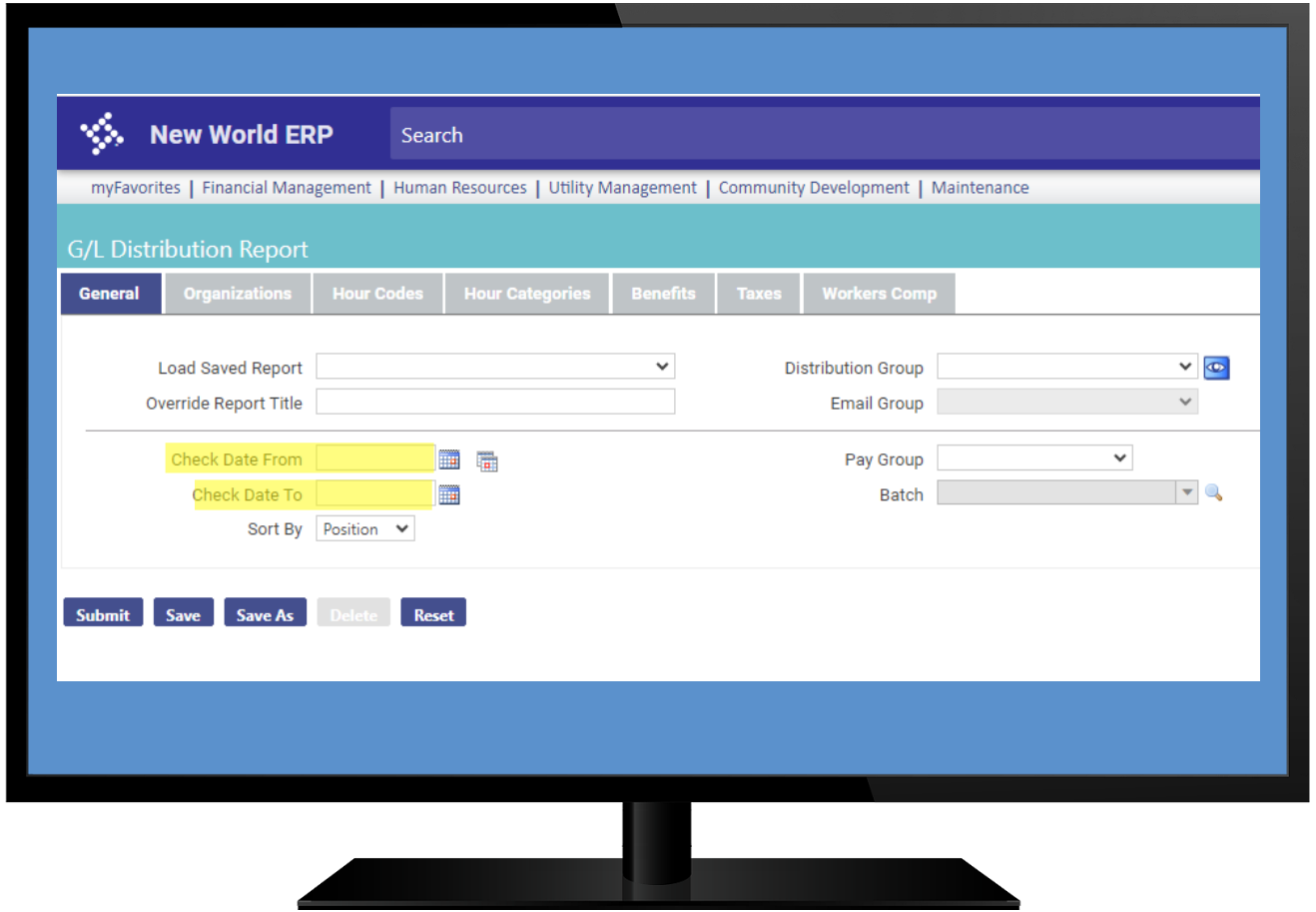
Quick Date Range?



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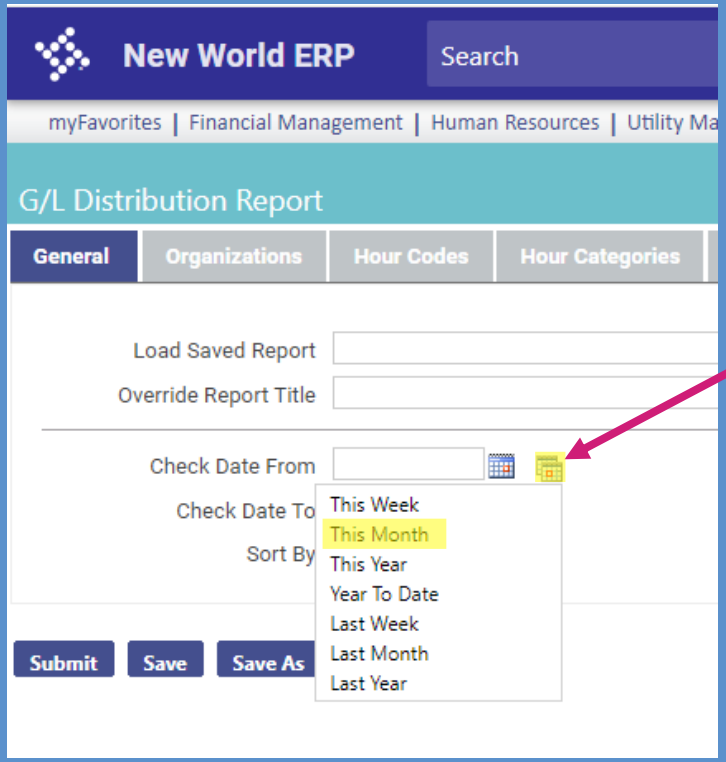

Clicking the double calendar allows you to choose common date ranges

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Choosing "This Month" populates the first day and last day of the current month

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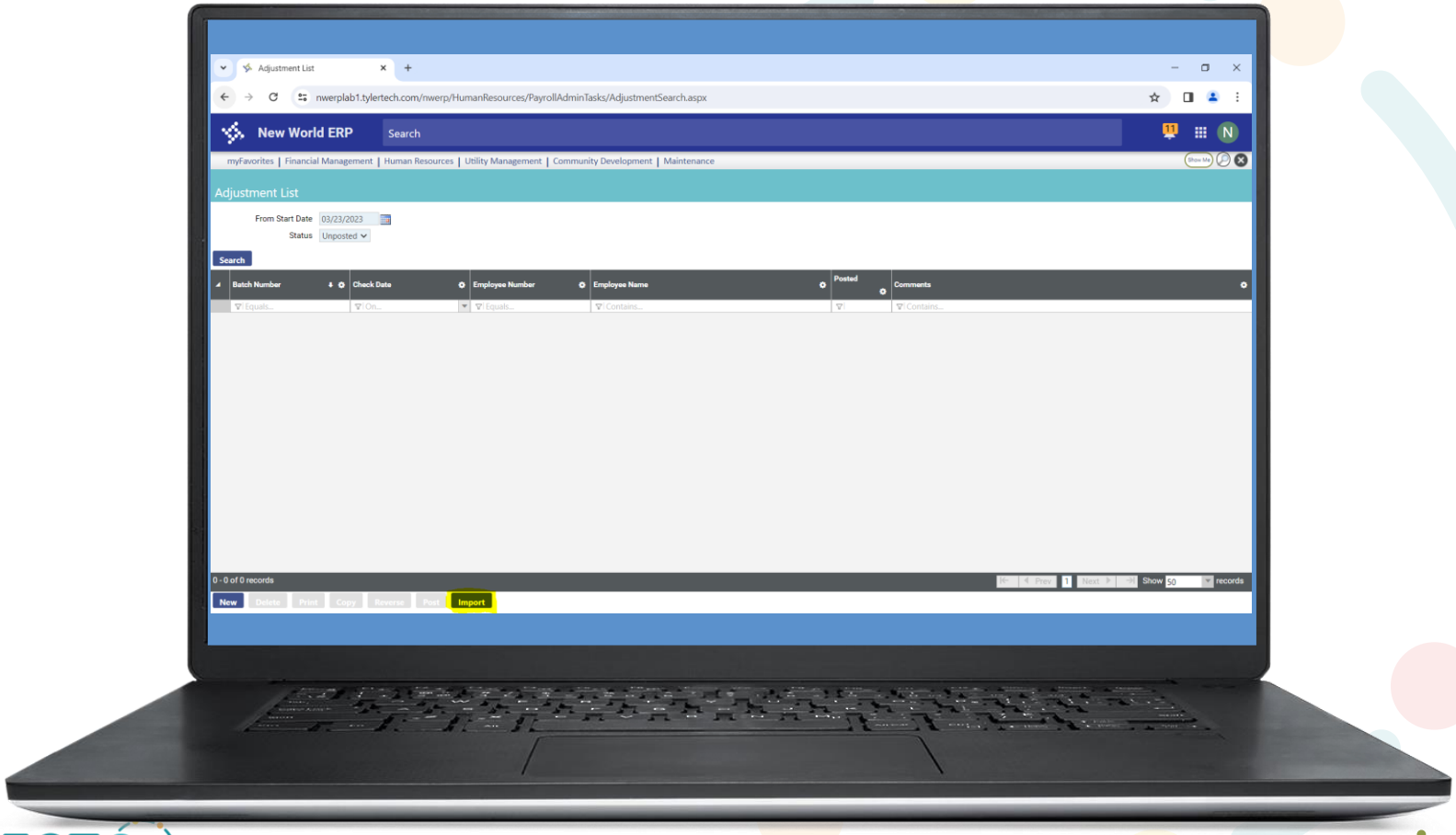

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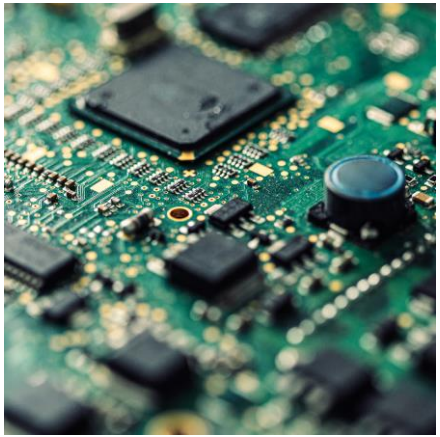
What Permission is This?



Ctrl

Shift

Left Click

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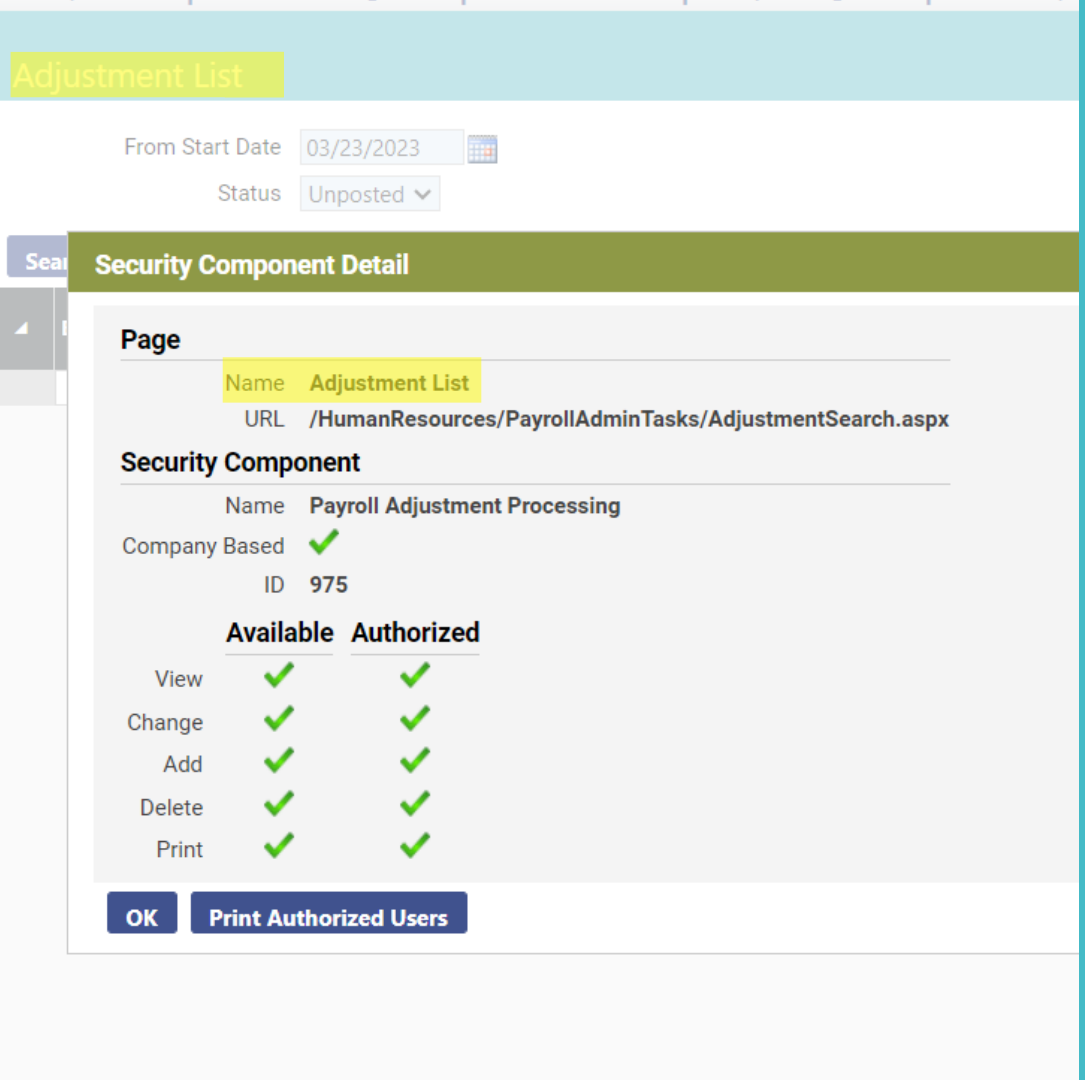

Ctrl + Shift + Left Mouse Click

On the Item You Need!

The result returned is for Adjustment Processing, not the Adjustment Import.

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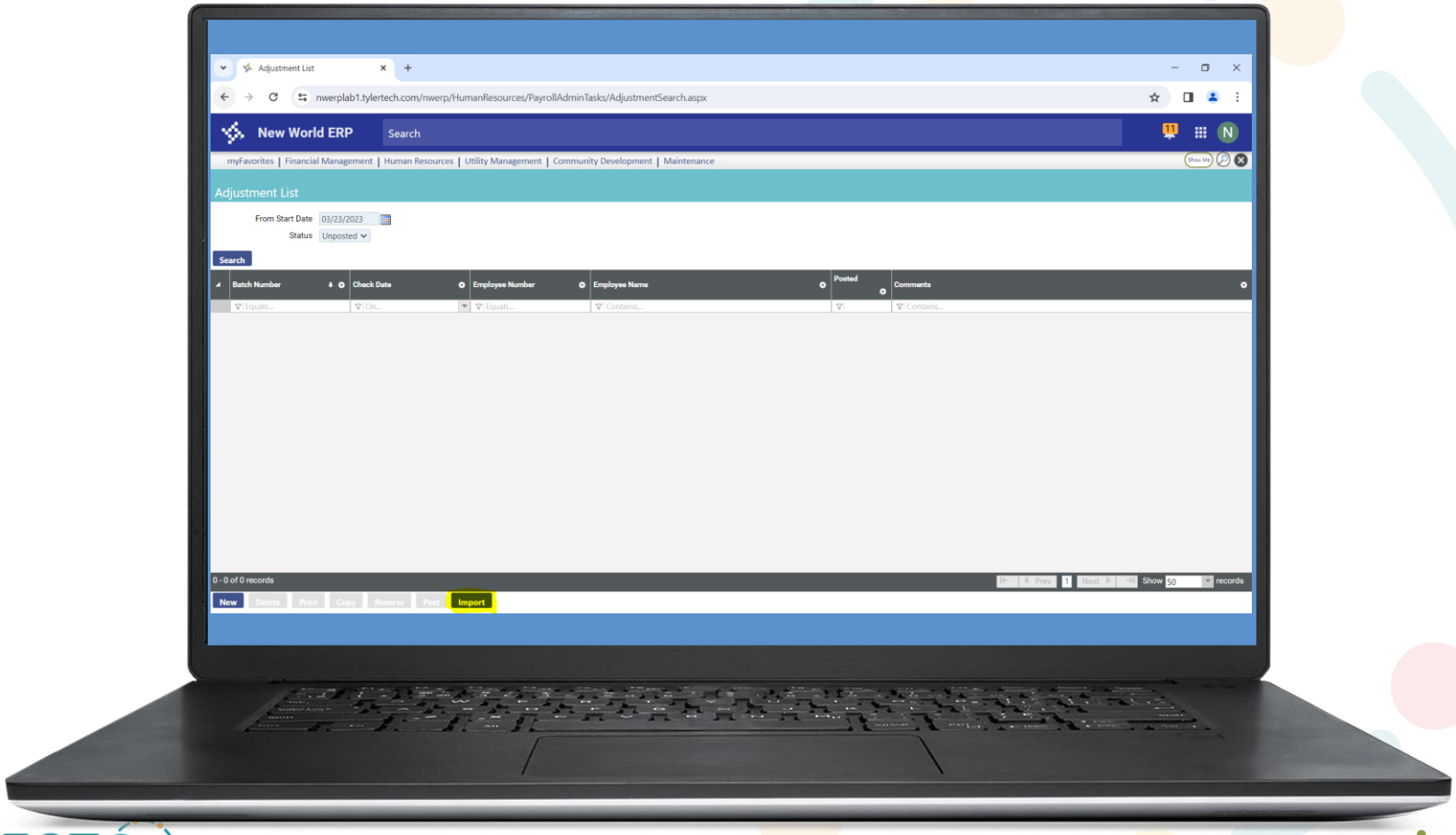

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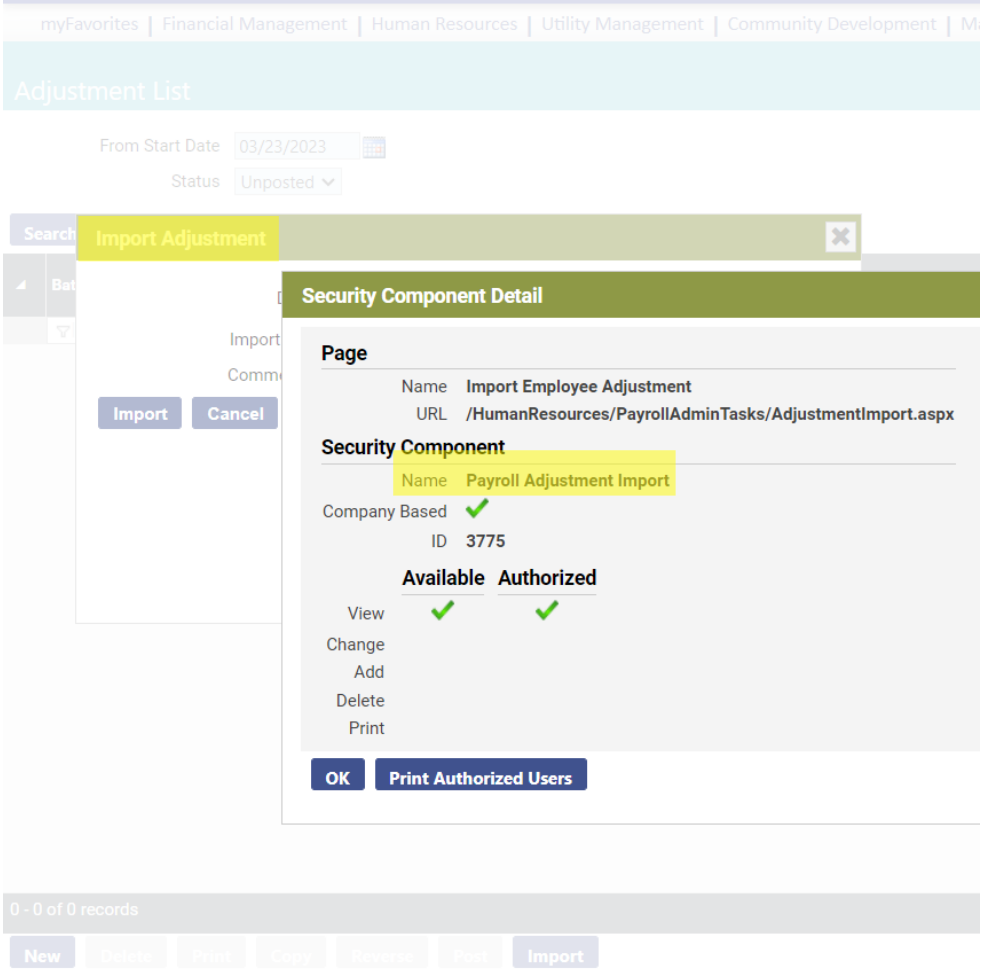

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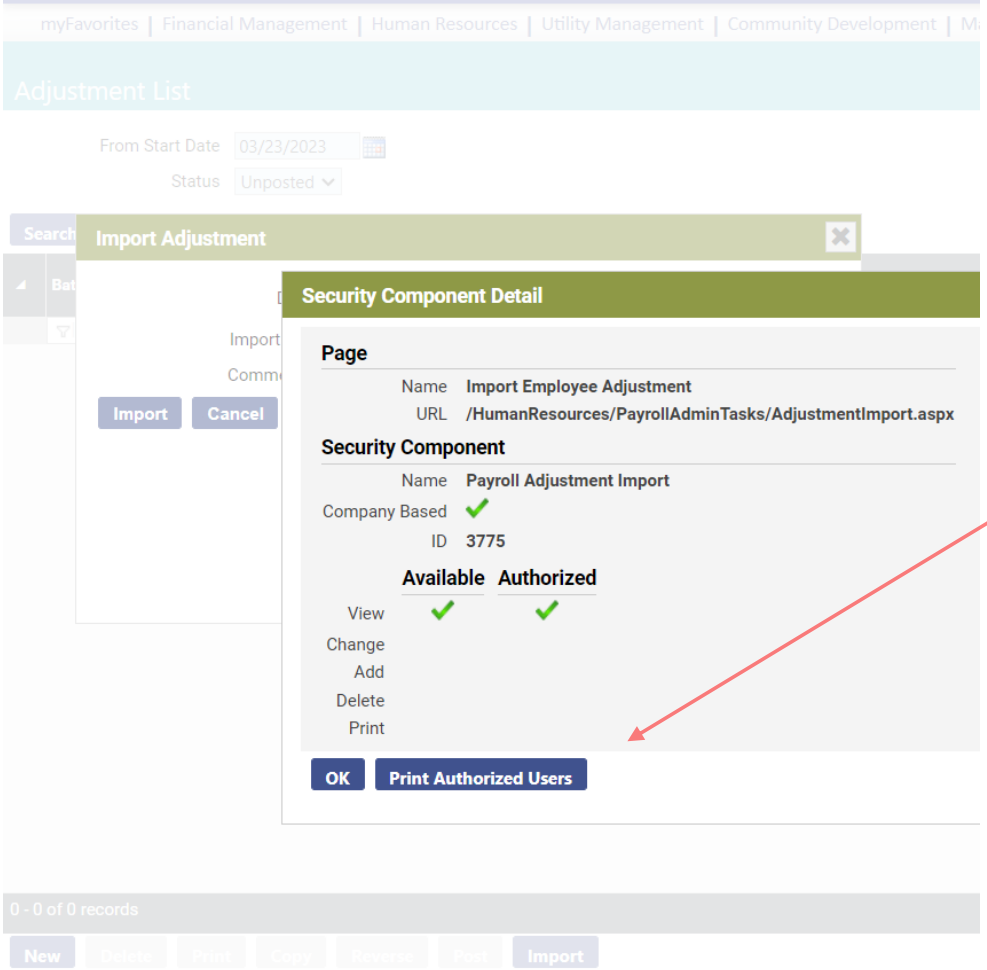

Concerned about who has access?

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Report Lists Users and Templates

Security Component Report - Google Chrome

nwerplab1.tylertech.com/nwerp/LogosSuite/SQLReports/SQLReportViewer.aspx?ReportGUID=fafb5efd-a20e-46de-8431-32e6bf710f7b&ComponentID=3193&ReportTitle=Security+Component+Report

2 of 2 Find | Next Send to myReports

CONNECT 24 transforming for tomorrow

Security Component Report
by Security Component

User	Add	Change	Delete	View/Use	Print	Undo Checkout	Finalize
User223				Yes			
User250				Yes			
User334				Yes			
User40				Yes			
User42				Yes			
User79				Yes			
User86				Yes			
User89				Yes			

Total User Count 61

Template	Add	Change	Delete	View/Use	Print	Undo Checkout	Finalize
HR ALL				Yes			

Run by NWS on 03/23/2024 14:19:04 PM

Page 2 of 2

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“Do the best you can until you know better. Then when you know better, do better.” -*Maya Angelou*

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Quick Link to Add a Value to a Validation Set

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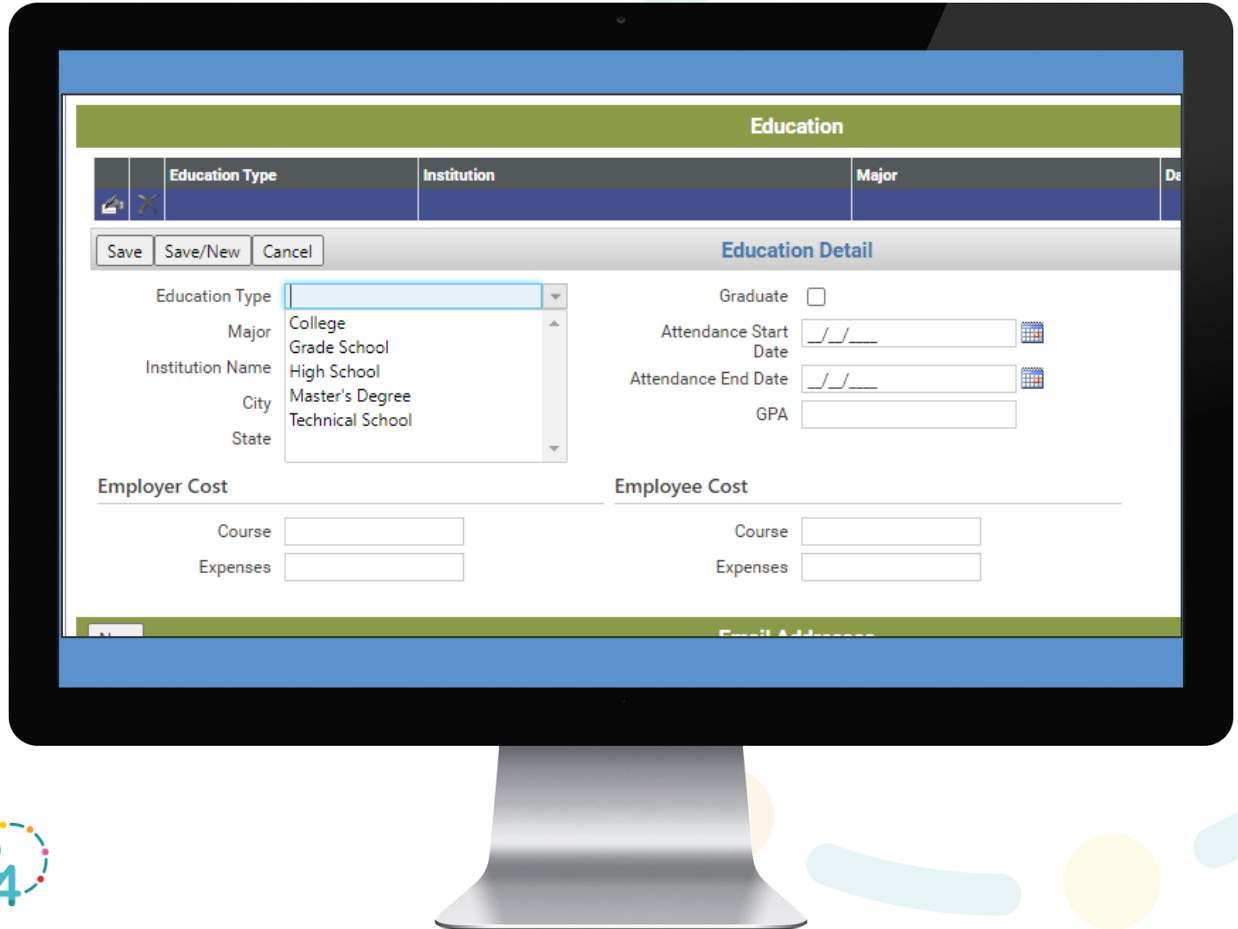

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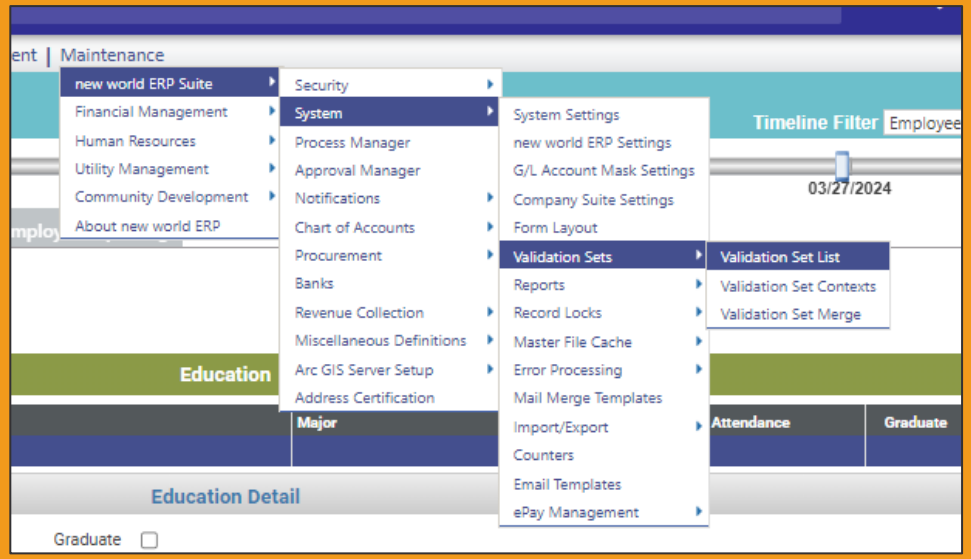

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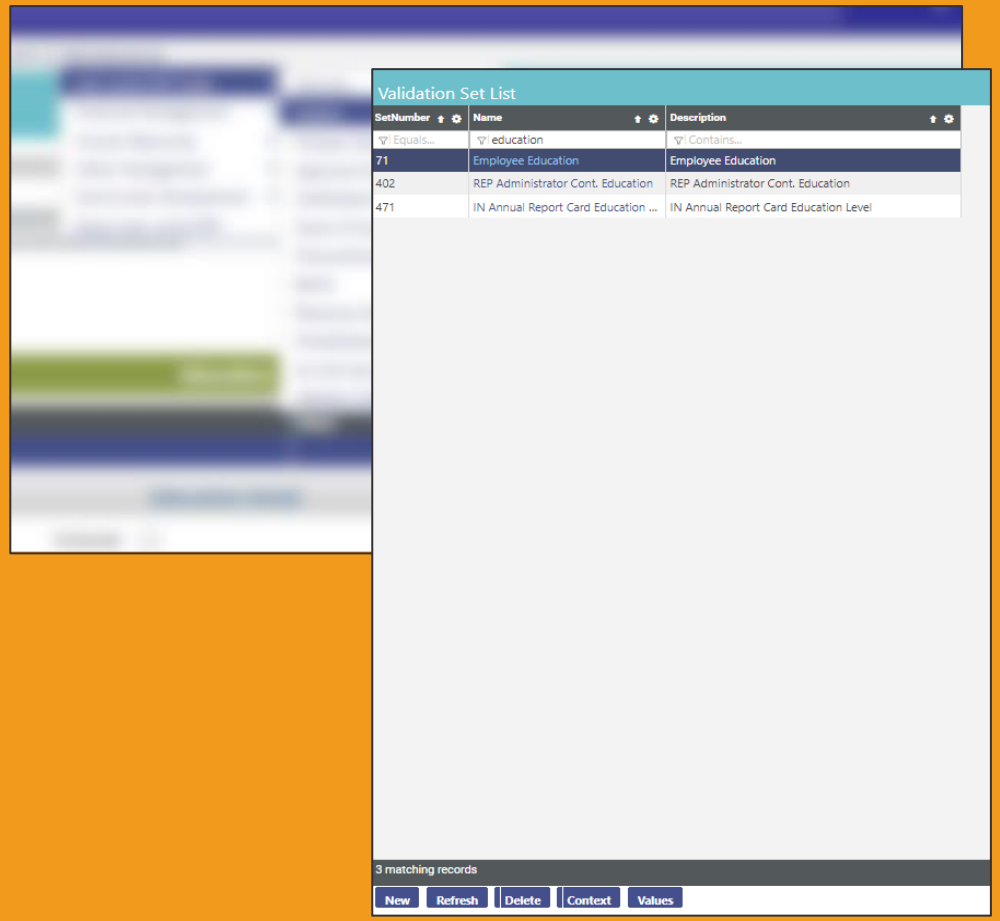

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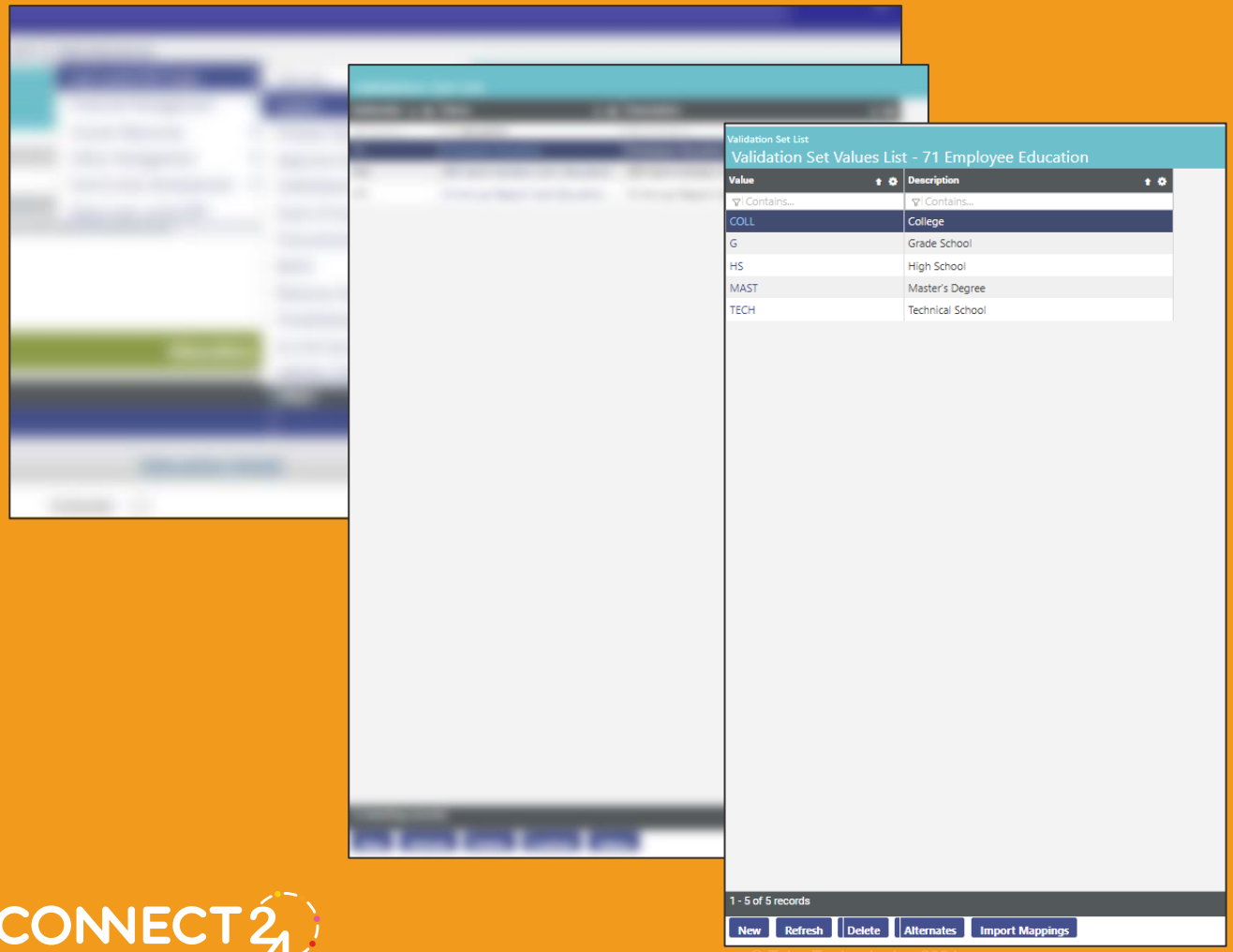

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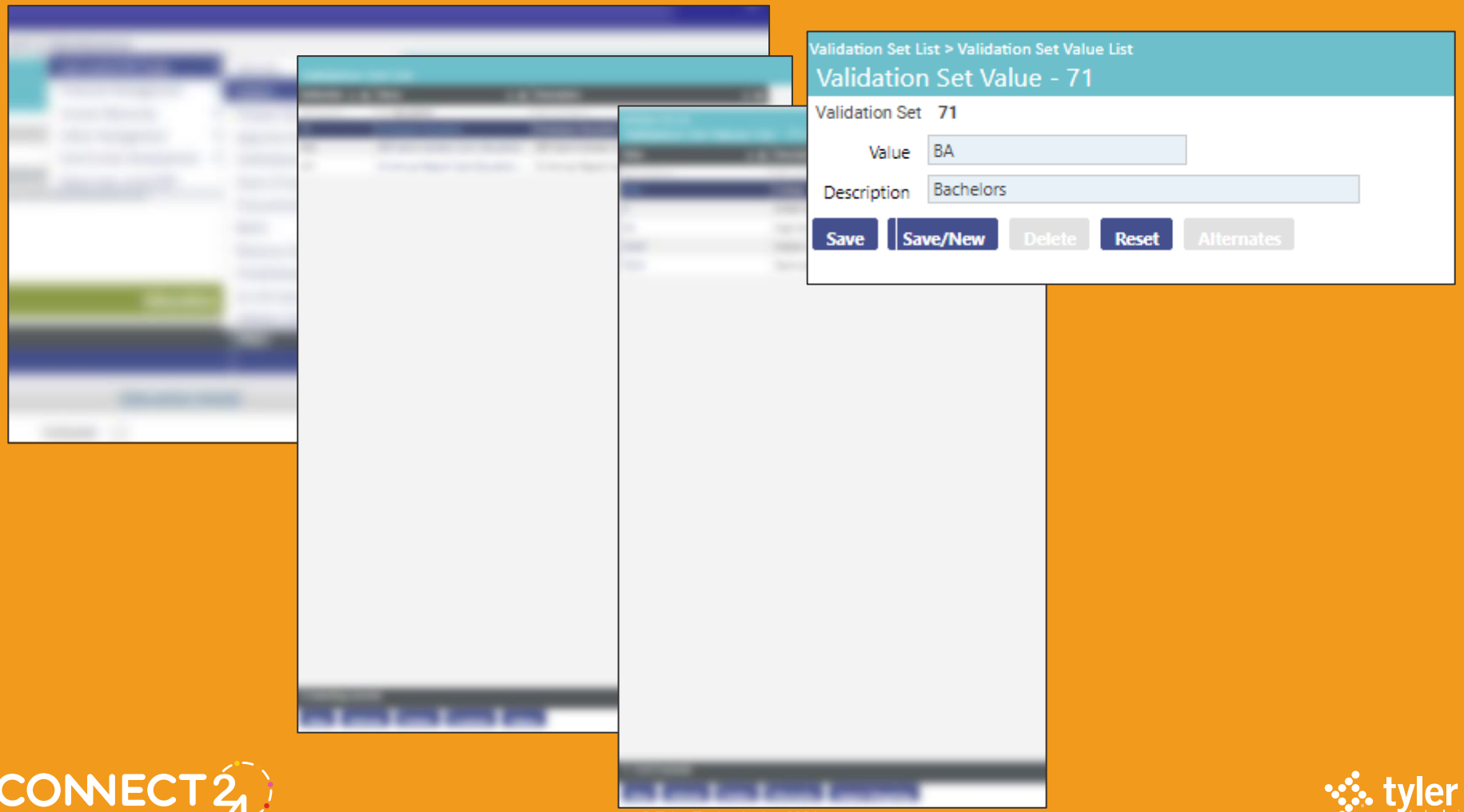

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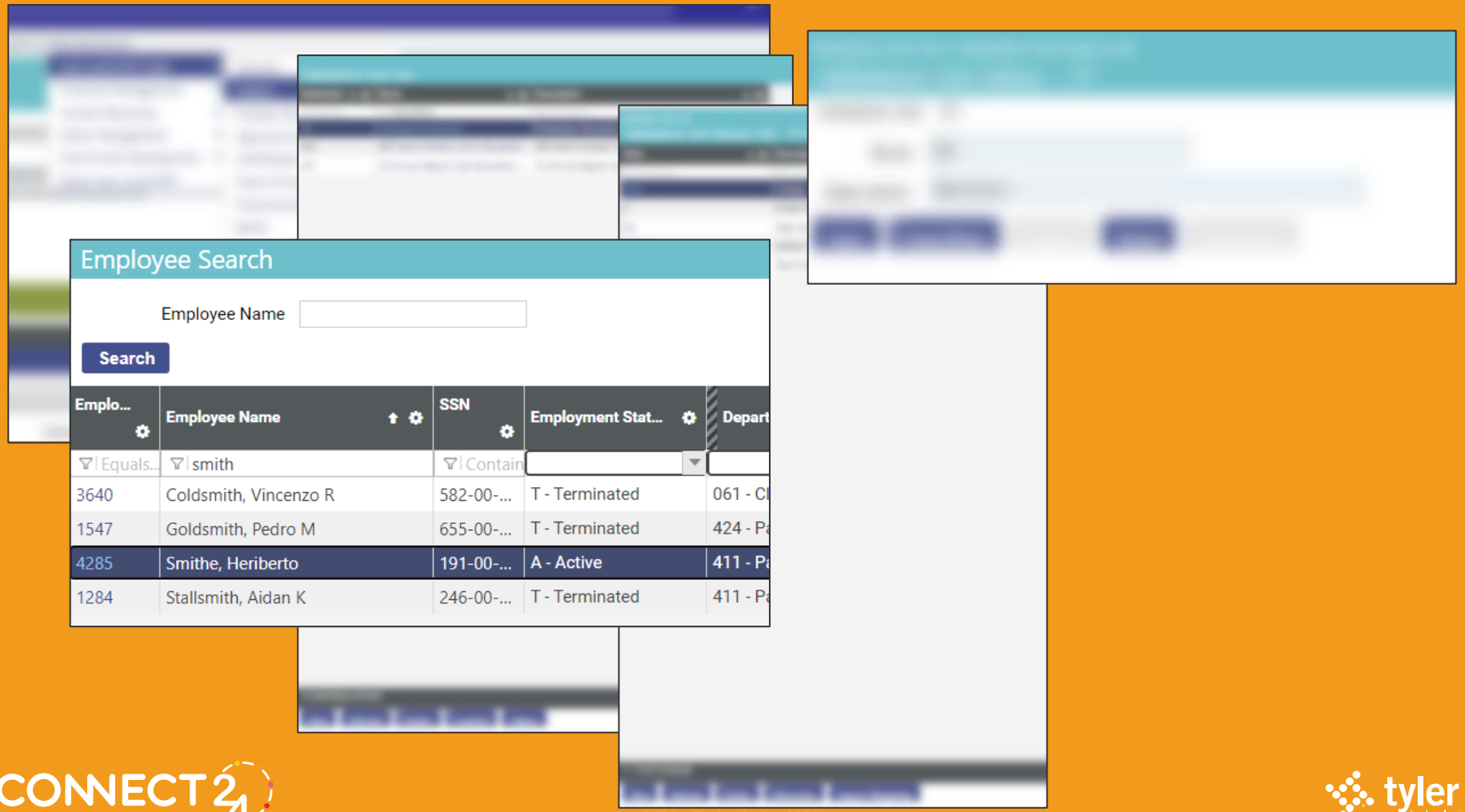

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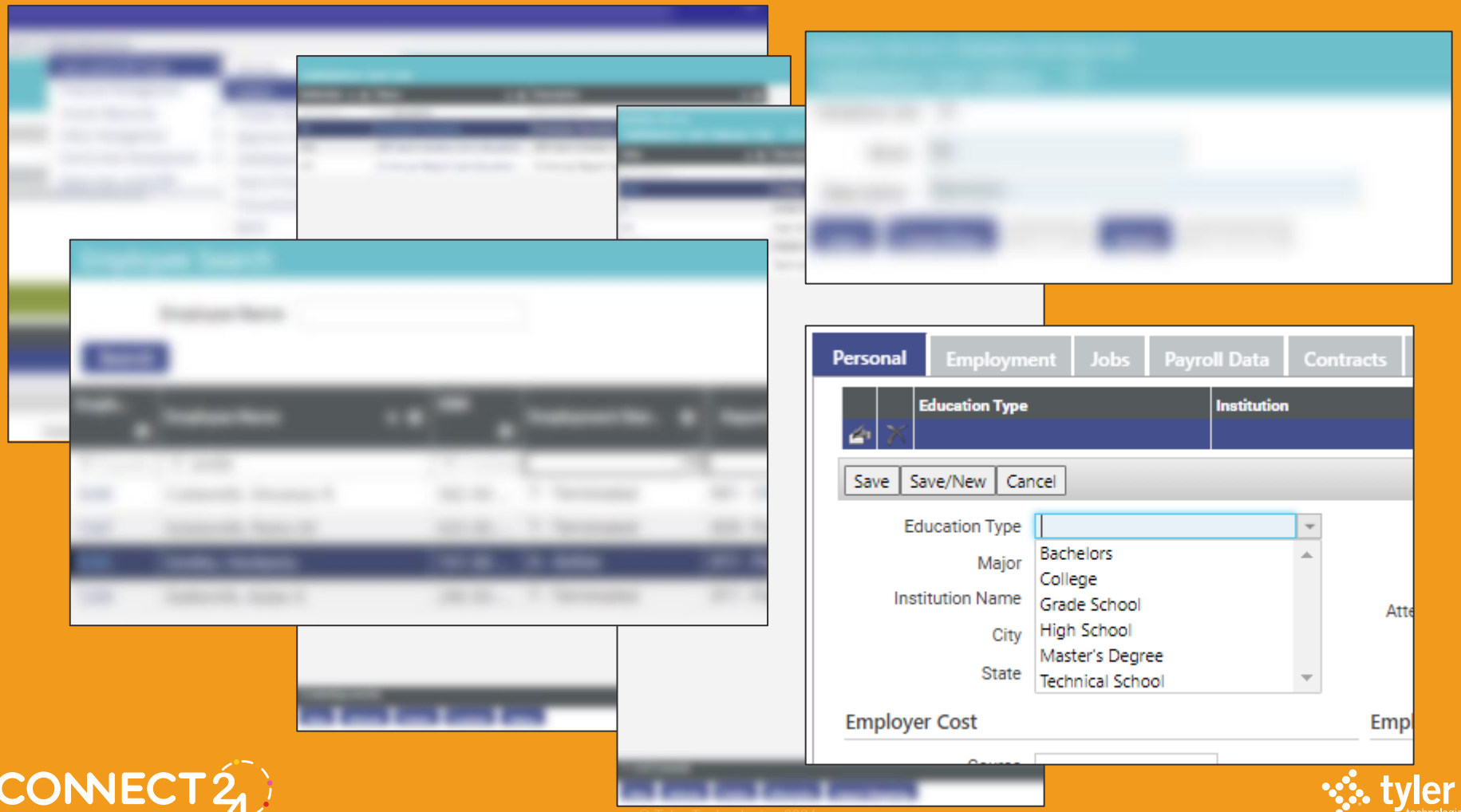

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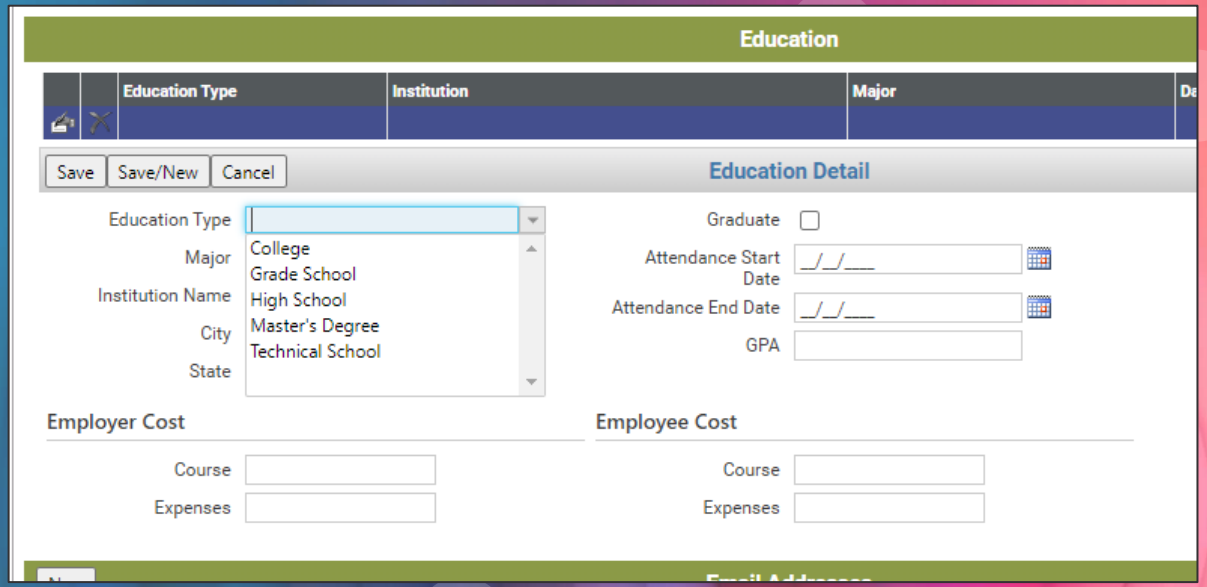

With your cursor in the field you need a new validation value:

Hold the Ctrl key on your keyboard and Left Click with your mouse

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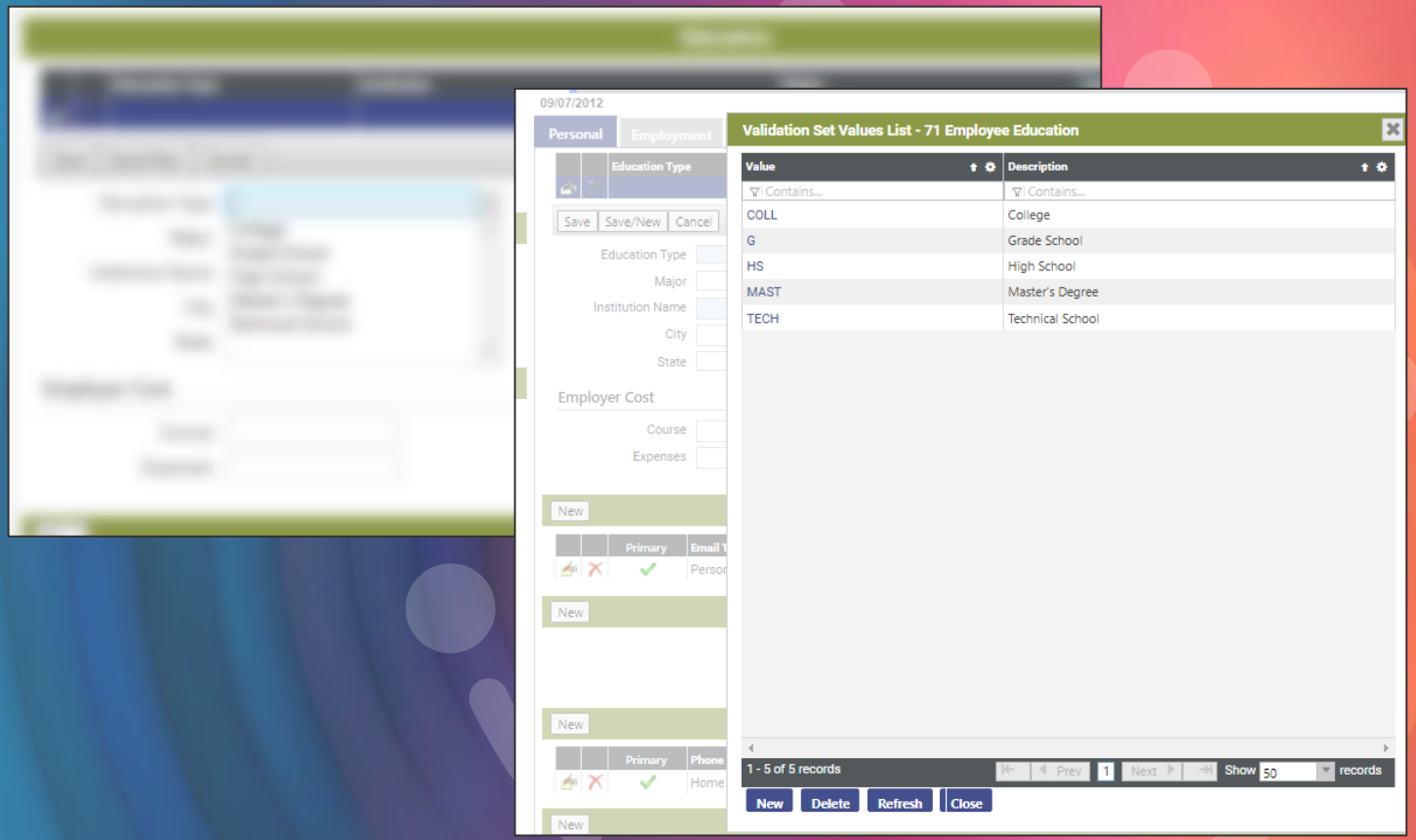

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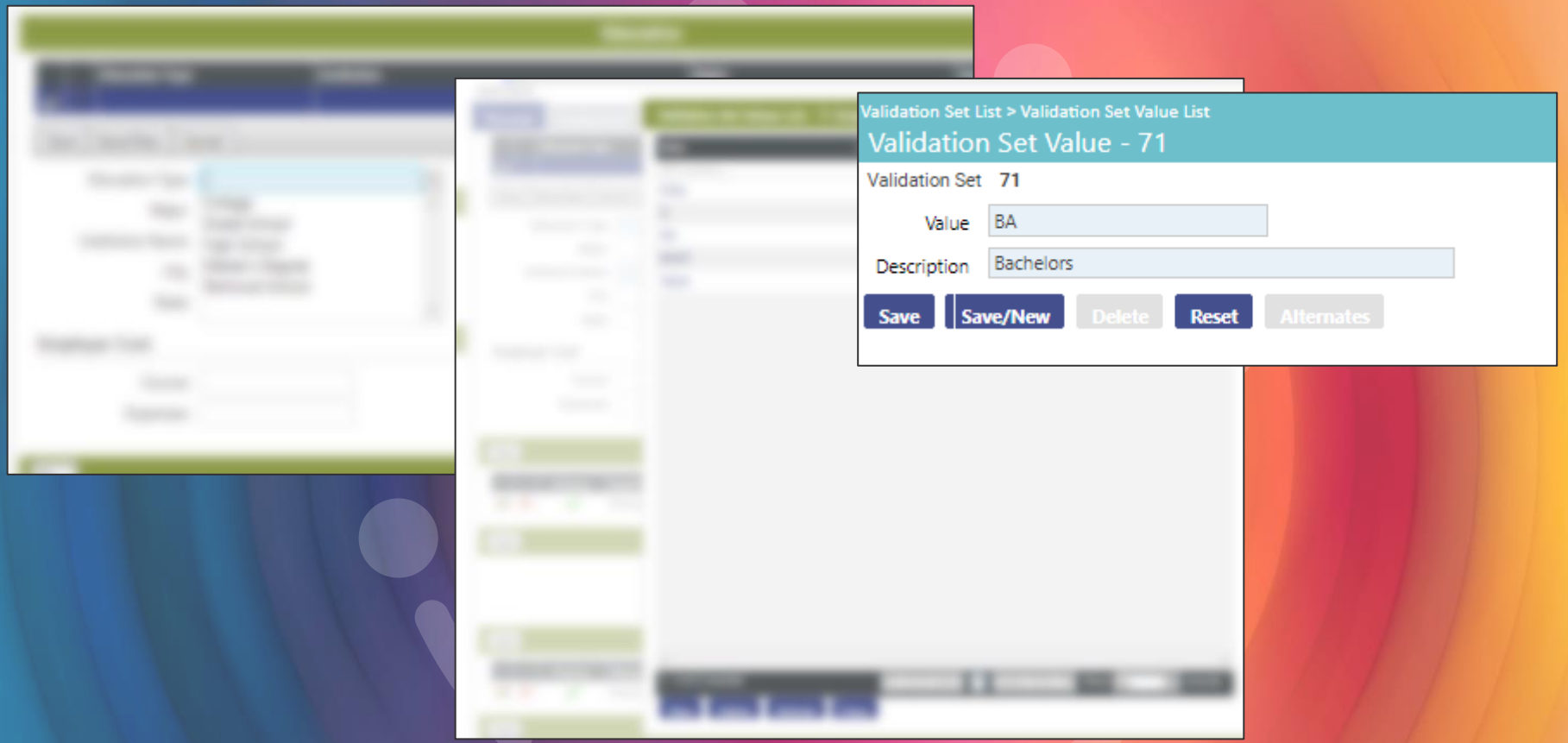

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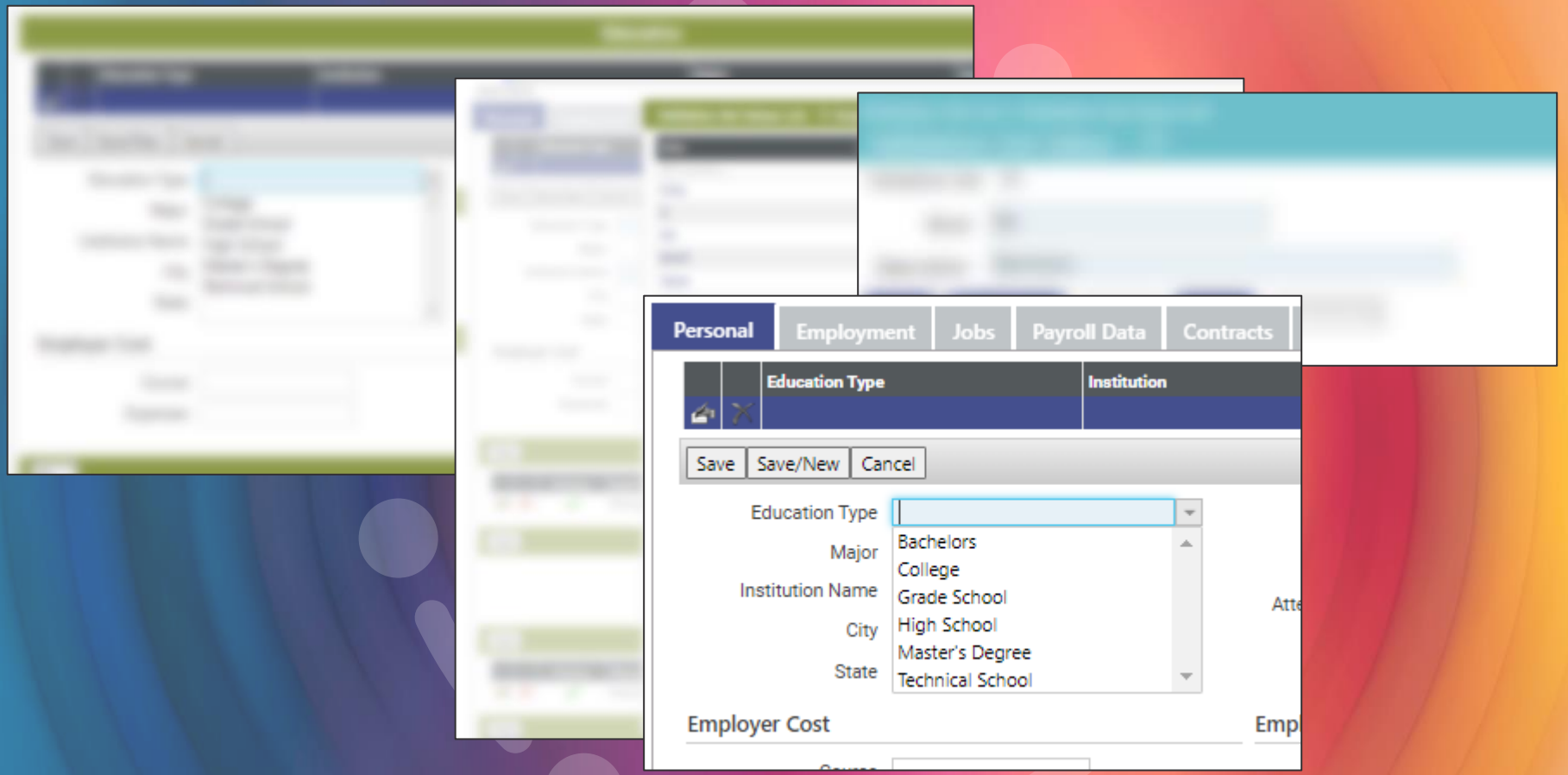

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Using Grids to Maximize Your Time

Why?

- Quick way to see information
- Retain filters while making mass changes
- Export a list

Where?

- Workforce
- Deduction & Benefit Codes
- Positions
- Many More!

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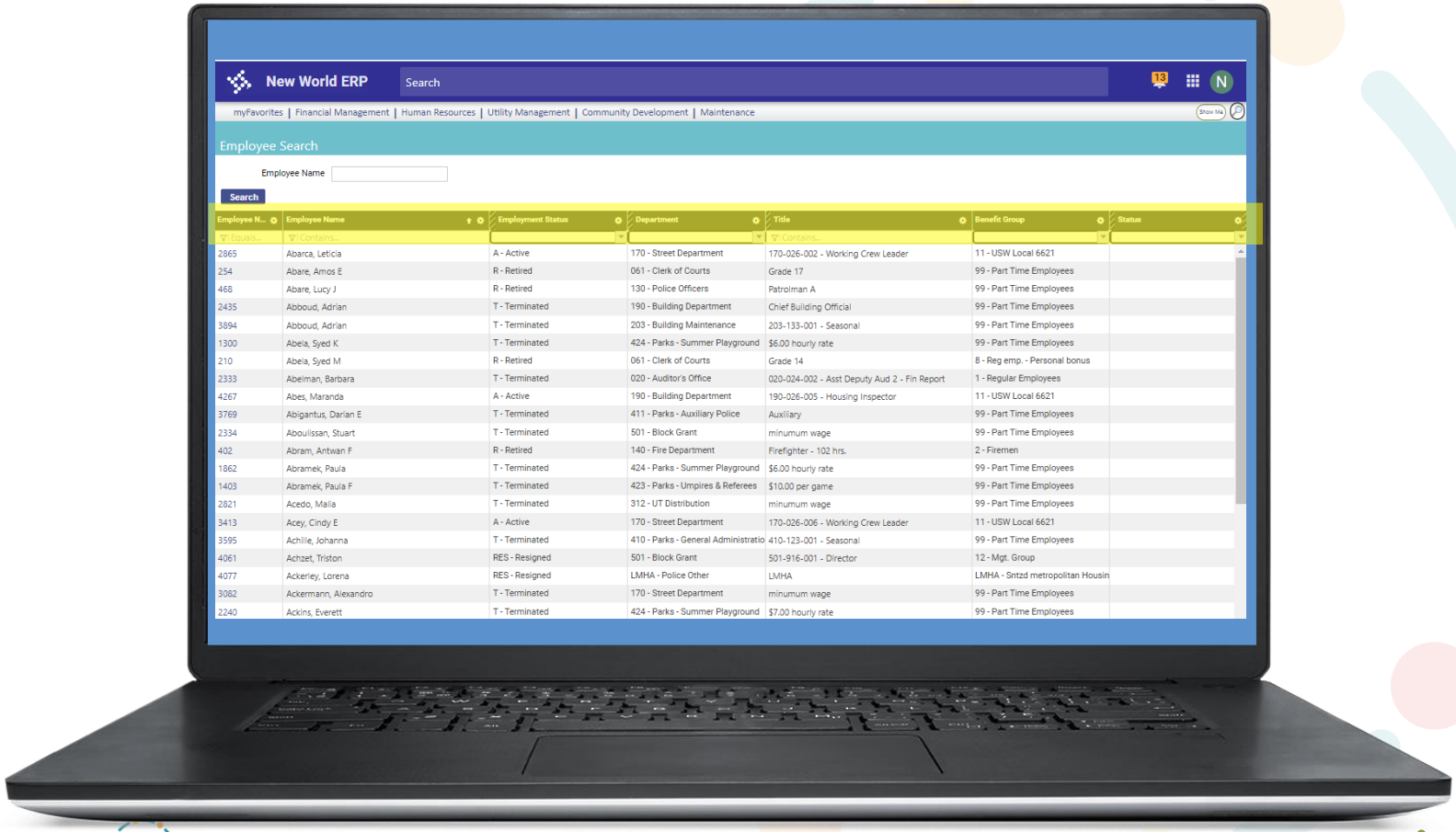

Employee N...	Employee Name	Employment Status	Department	Title	Benefit Group	Status
2865	Abarca, Leticia	A - Active	170 - Street Department	170-026-002 - Working Crew Leader	11 - USW Local 6621	
254	Abare, Amos E	R - Retired	061 - Clerk of Courts	Grade 17	99 - Part Time Employees	
468	Abare, Lucy J	R - Retired	130 - Police Officers	Patrolman A	99 - Part Time Employees	
2435	Abboud, Adrian	T - Terminated	190 - Building Department	Chief Building Official	99 - Part Time Employees	
3894	Abboud, Adrian	T - Terminated	203 - Building Maintenance	203-133-001 - Seasonal	99 - Part Time Employees	
1300	Abela, Syed K	T - Terminated	424 - Parks - Summer Playground	$6.00 hourly rate	99 - Part Time Employees	
210	Abela, Syed M	R - Retired	061 - Clerk of Courts	Grade 14	8 - Reg emp. - Personal bonus	
2333	Abelman, Barbara	T - Terminated	020 - Auditor's Office	020-024-002 - Asst Deputy Aud 2 - Fin Report	1 - Regular Employees	
4267	Abes, Maranda	A - Active	190 - Building Department	190-026-005 - Housing Inspector	11 - USW Local 6621	
3769	Abigantus, Darian E	T - Terminated	411 - Parks - Auxiliary Police	Auxiliary	99 - Part Time Employees	
2334	Aboulissan, Stuart	T - Terminated	501 - Block Grant	minumum wage	99 - Part Time Employees	
402	Abram, Antwan F	R - Retired	140 - Fire Department	Firefighter - 102 hrs.	2 - Firemen	
1862	Abramek, Paula	T - Terminated	424 - Parks - Summer Playground	$6.00 hourly rate	99 - Part Time Employees	
1403	Abramek, Paula F	T - Terminated	423 - Parks - Umpires & Referees	$10.00 per game	99 - Part Time Employees	
2821	Acedo, Malia	T - Terminated	312 - UT Distribution	minumum wage	99 - Part Time Employees	
3413	Acey, Cindy E	A - Active	170 - Street Department	170-026-006 - Working Crew Leader	11 - USW Local 6621	
3595	Achille, Johanna	T - Terminated	410 - Parks - General Administratio	410-123-001 - Seasonal	99 - Part Time Employees	
4061	Achzet, Triston	RES - Resigned	501 - Block Grant	501-916-001 - Director	12 - Mgt. Group	
4077	Ackerley, Lorena	RES - Resigned	LMHA - Police Other	LMHA	LMHA - Sntzd metropolitan Housin	
3082	Ackermann, Alexandro	T - Terminated	170 - Street Department	minumum wage	99 - Part Time Employees	
2240	Ackins, Everett	T - Terminated	424 - Parks - Summer Playground	$7.00 hourly rate	99 - Part Time Employees	

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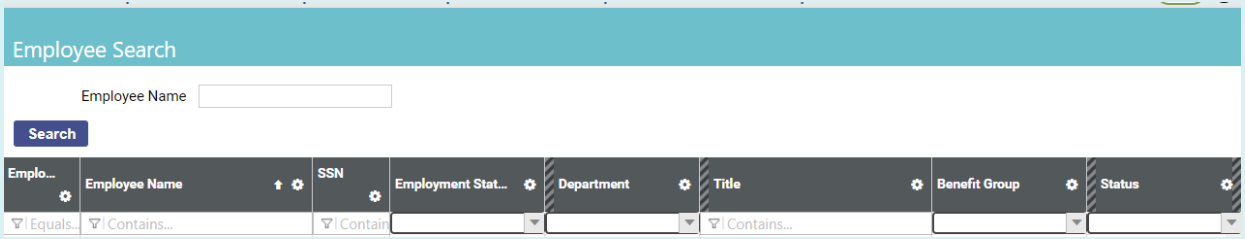
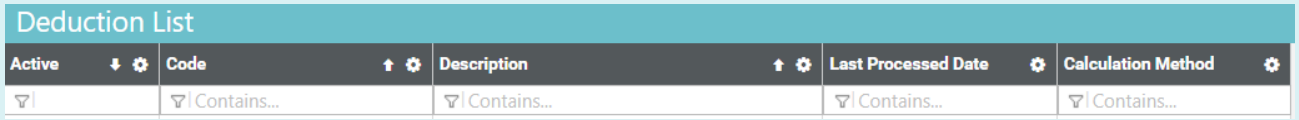
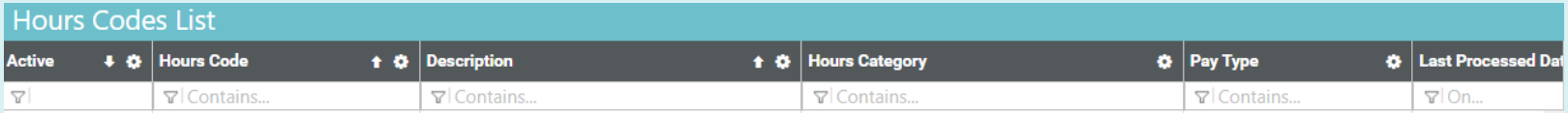
Grid Columns







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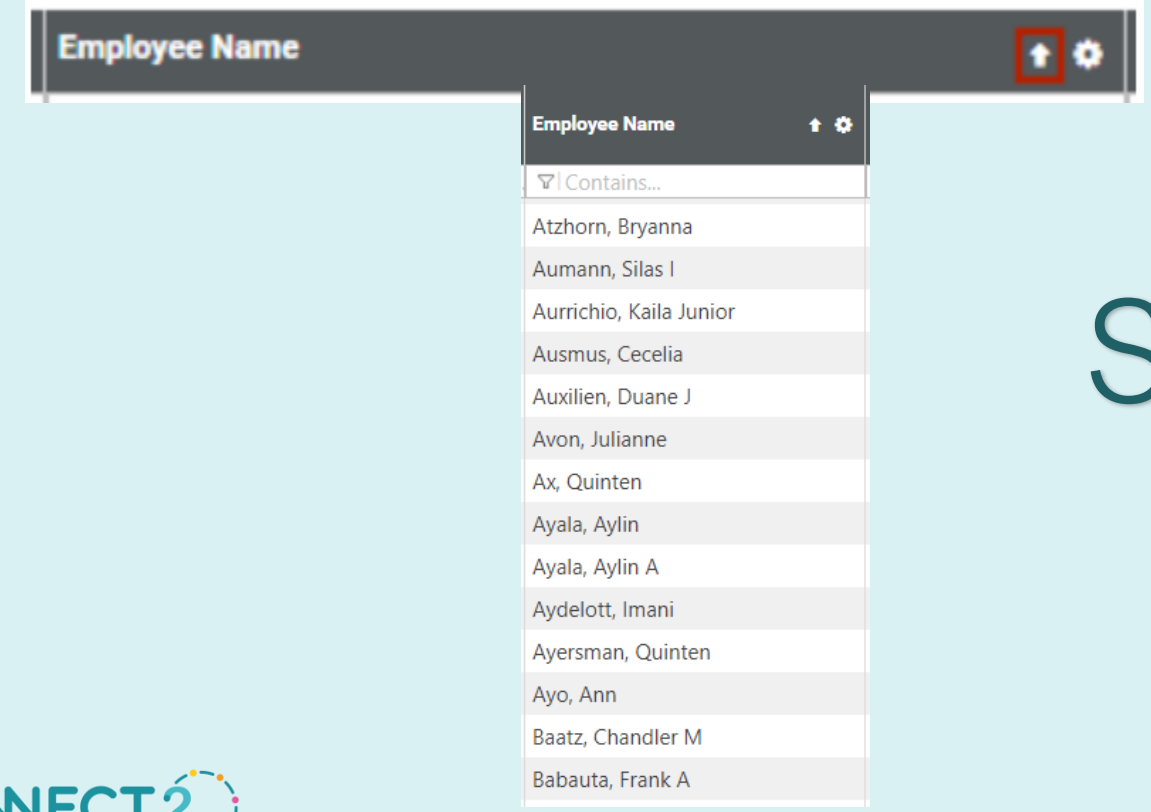

Sort

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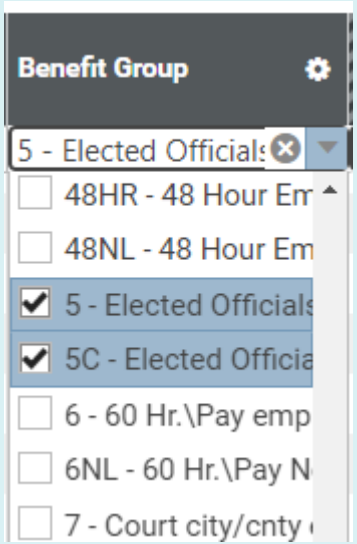

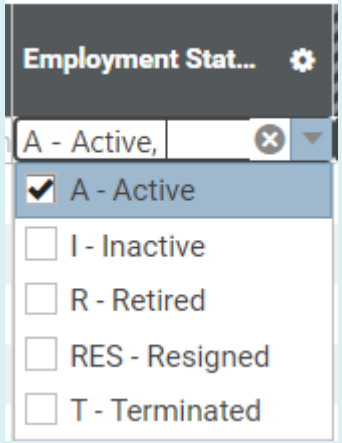

Filter on One or More

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Employee Search

Employee Name

Search

Employ...	Employee Name	Employment Status	Department	Title	Benefit Group	Status
Equals...	Contains...	A - Active		Contains...	5 - Elected Officials	
4170	Beecken, Marlon	A - Active	001 - Council	001-059-002 - Council Person	5C - Elected Officials paid	
186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials paid	
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials paid	
3021	Difrancisco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials	
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials	
2183	Gonzale, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials	
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials paid	
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials paid	
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person at La...	5C - Elected Officials paid	
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials	
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials	
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials	
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials	
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials paid	
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials paid	

15 matching records

Prev 1 Next Show 50 records

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Scenario:

Your Elected Officials will be receiving a new Life Insurance benefit effective June 1st. The benefit code is created and must be added to the appropriate employees.

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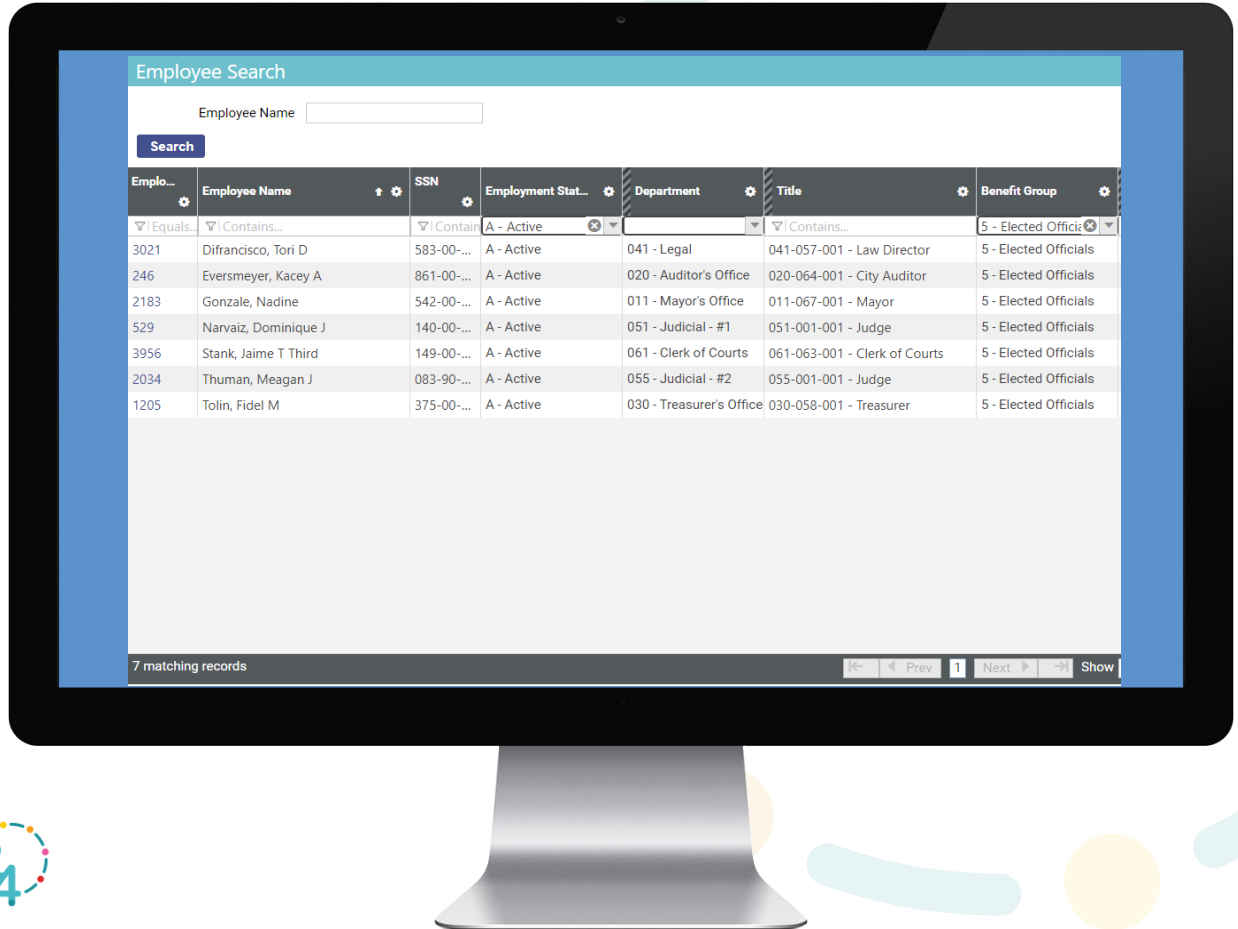
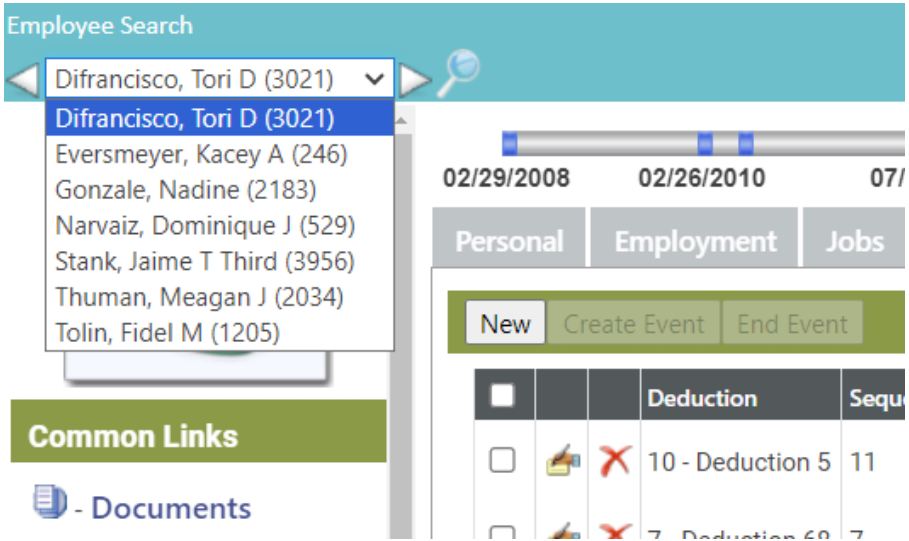

Employee Search
Employee Name
Search
Emplo...
Employee Name
SSN
Employment Stat...
Department
Title
Benefit Group
Equals...
Contains...
Contain
A - Active
Contains...
5 - Elected Officia
3021 Difrancisco, Tori D 583-00-... A - Active 041 - Legal 041-057-001 - Law Director 5 - Elected Officials
246 Eversmeyer, Kacey A 861-00-... A - Active 020 - Auditor's Office 020-064-001 - City Auditor 5 - Elected Officials
2183 Gonzale, Nadine 542-00-... A - Active 011 - Mayor's Office 011-067-001 - Mayor 5 - Elected Officials
529 Narvaiz, Dominique J 140-00-... A - Active 051 - Judicial - #1 051-001-001 - Judge 5 - Elected Officials
3956 Stank, Jaime T Third 149-00-... A - Active 061 - Clerk of Courts 061-063-001 - Clerk of Courts 5 - Elected Officials
2034 Thuman, Meagan J 083-90-... A - Active 055 - Judicial - #2 055-001-001 - Judge 5 - Elected Officials
1205 Tolin, Fidel M 375-00-... A - Active 030 - Treasurer's Office 030-058-001 - Treasurer 5 - Elected Officials
7 matching records
Prev
1
Next
Show



The results of the filter from the Employee Search grid are retained.

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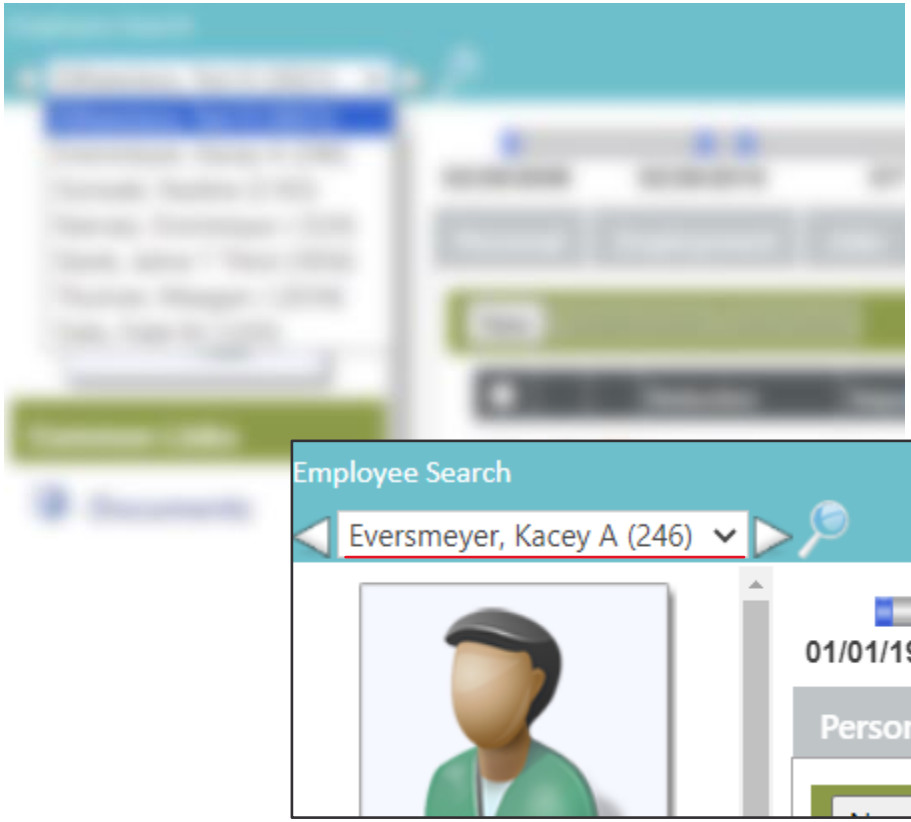

You also retain the tab you last worked in for less “clicking”.

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Feature Chooser

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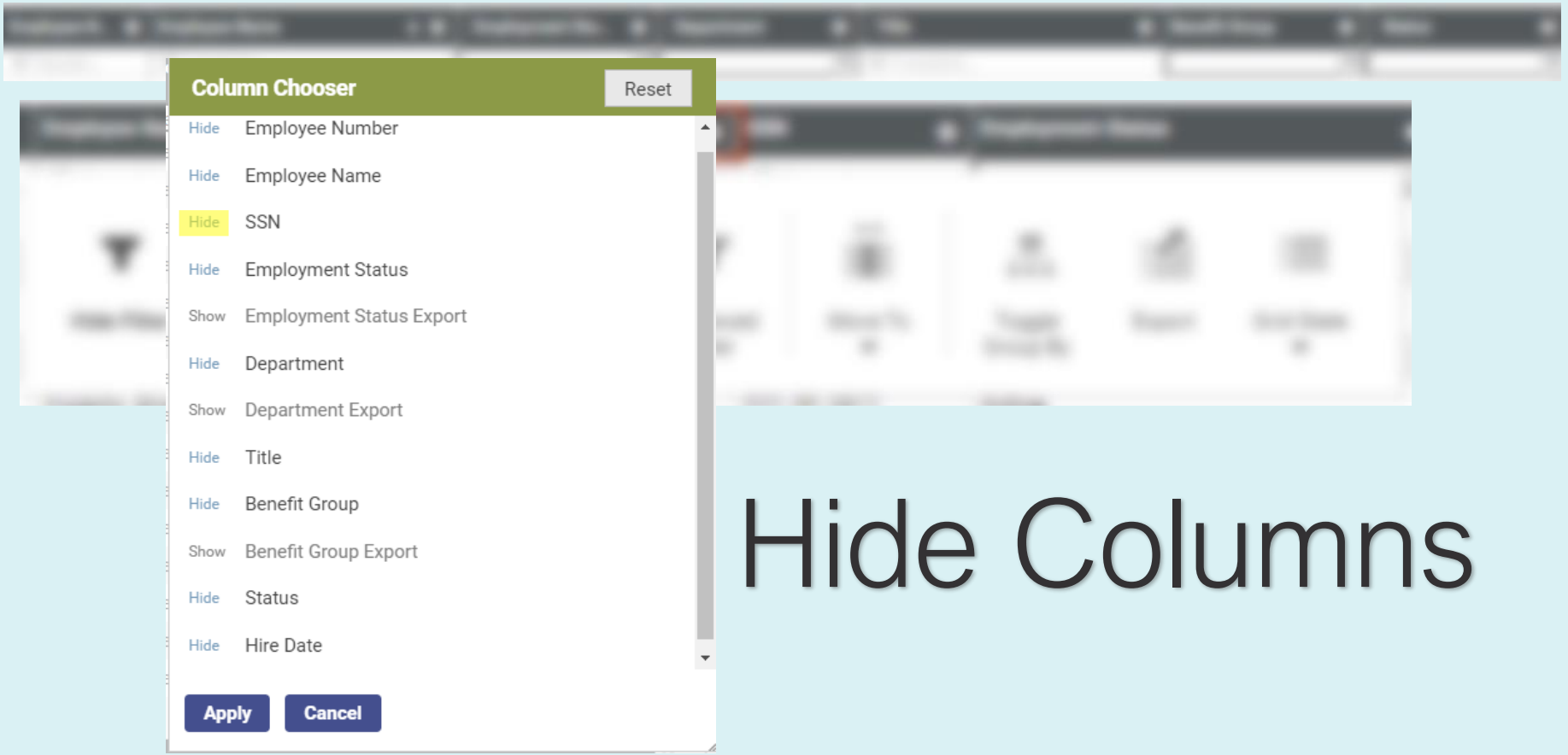

Hide Columns

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Employee Search

Employee Name

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186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials paid	
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials paid	
3021	Difrancisco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials	
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials	
2183	Gonzale, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials	
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials paid	
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials paid	
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person at La...	5C - Elected Officials paid	
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials	
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials	
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials	
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Office	030-058-001 - Treasurer	5 - Elected Officials	
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials paid	
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials paid	

15 matching records

Prev 1 Next Show 50 records

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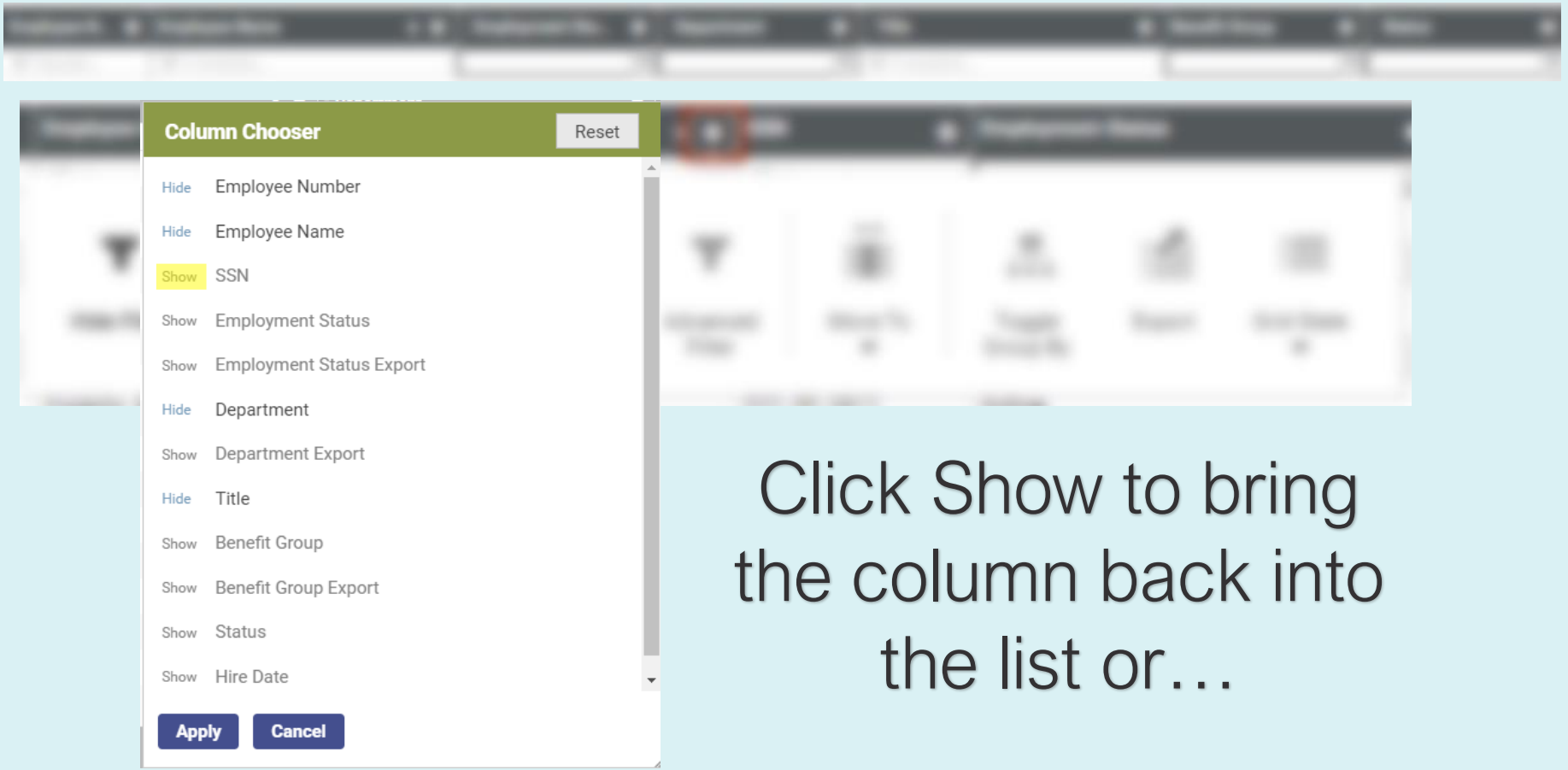

Click Show to bring the column back into the list or…

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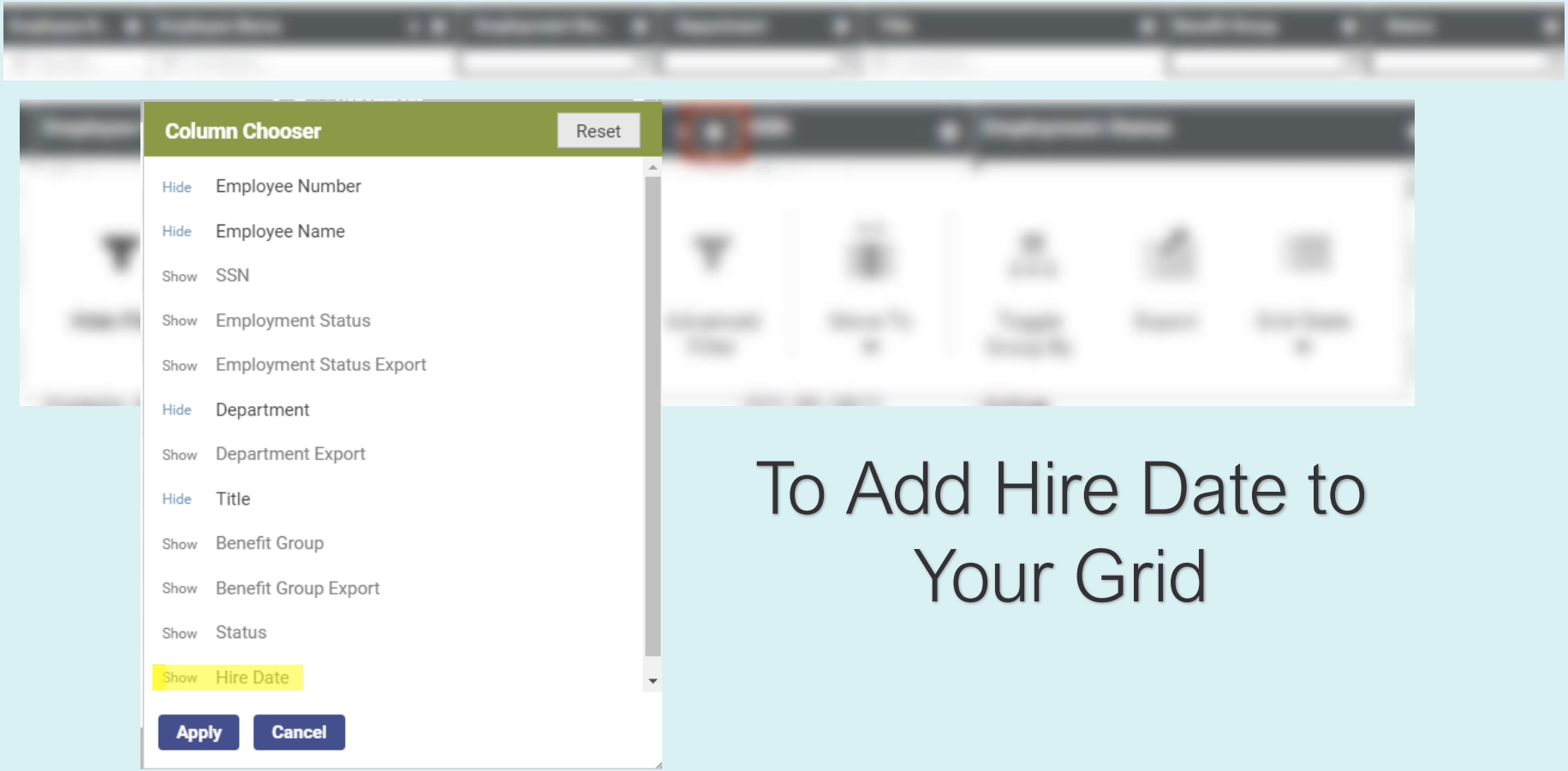

To Add Hire Date to Your Grid

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Employee Search

Employee Name

Search

Emplo...	Employee Name	Employment St...	Department	Title	Benefit Group	Status	Hire Date
Equals...	Contains...	A - Active		Contains...	5 - Elected Offic		On...
4170	Beecken, Marlon	A - Active	001 - Council	001-059-002 - Council Person	5C - Elected Officials		01/01/2022
186	Cutrell, Keith	A - Active	001 - Council	001-059-005 - Council Person	5C - Elected Officials		01/23/1974
3741	Debeaumont, Dayana	A - Active	001 - Council	001-059-003 - Council Person	5C - Elected Officials		01/01/2016
3021	Difrancisco, Tori D	A - Active	041 - Legal	041-057-001 - Law Director	5 - Elected Officials		03/01/2008
246	Eversmeyer, Kacey A	A - Active	020 - Auditor's Office	020-064-001 - City Auditor	5 - Elected Officials		05/19/1986
2183	Gonzale, Nadine	A - Active	011 - Mayor's Office	011-067-001 - Mayor	5 - Elected Officials		02/16/1999
4169	Kreamalmeyer, Armani J	A - Active	001 - Council	001-059-004 - Council Person	5C - Elected Officials		01/01/2022
3536	Leeks, Destini	A - Active	001 - Council	001-059-008 - Council Person	5C - Elected Officials		01/01/2014
4018	Maiello, Johanna J	A - Active	001 - Council	001-059-011 - Council Person ...	5C - Elected Officials		07/01/2019
529	Narvaiz, Dominique J	A - Active	051 - Judicial - #1	051-001-001 - Judge	5 - Elected Officials		04/01/1992
3956	Stank, Jaime T Third	A - Active	061 - Clerk of Courts	061-063-001 - Clerk of Courts	5 - Elected Officials		01/13/2019
2034	Thuman, Meagan J	A - Active	055 - Judicial - #2	055-001-001 - Judge	5 - Elected Officials		01/01/2004
1205	Tolin, Fidel M	A - Active	030 - Treasurer's Offic	030-058-001 - Treasurer	5 - Elected Officials		08/06/2007
3017	Tueller, Misty P	A - Active	001 - Council	001-060-001 - Council President	5C - Elected Officials		02/01/2008
3858	Washabaugh, Adolfo	A - Active	001 - Council	001-059-001 - Council Person	5C - Elected Officials		01/01/2018

15 matching records

Prev 1 Next Show 50 records

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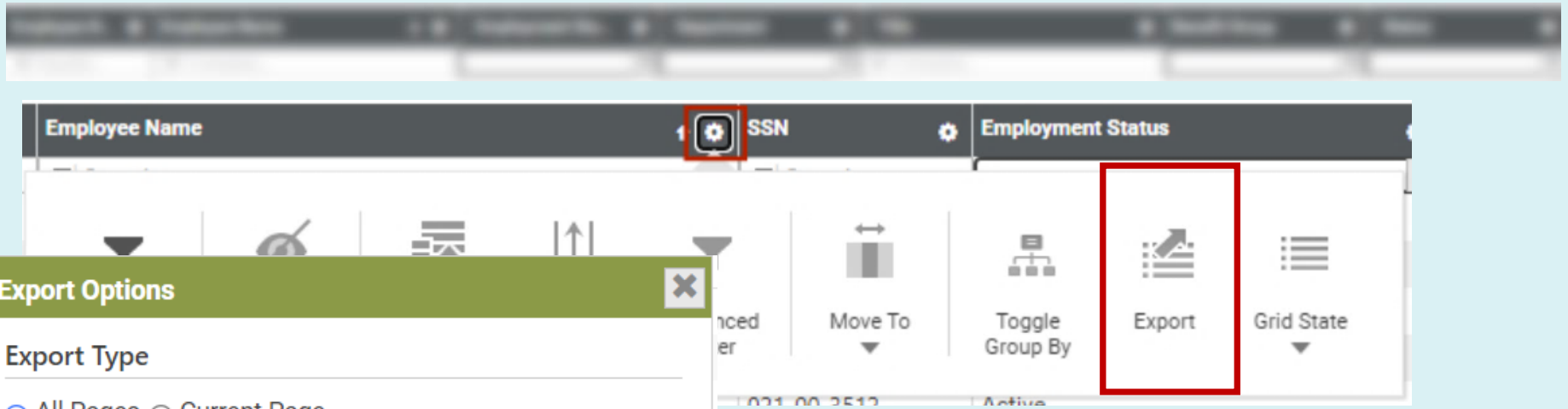

Export for a Quick List

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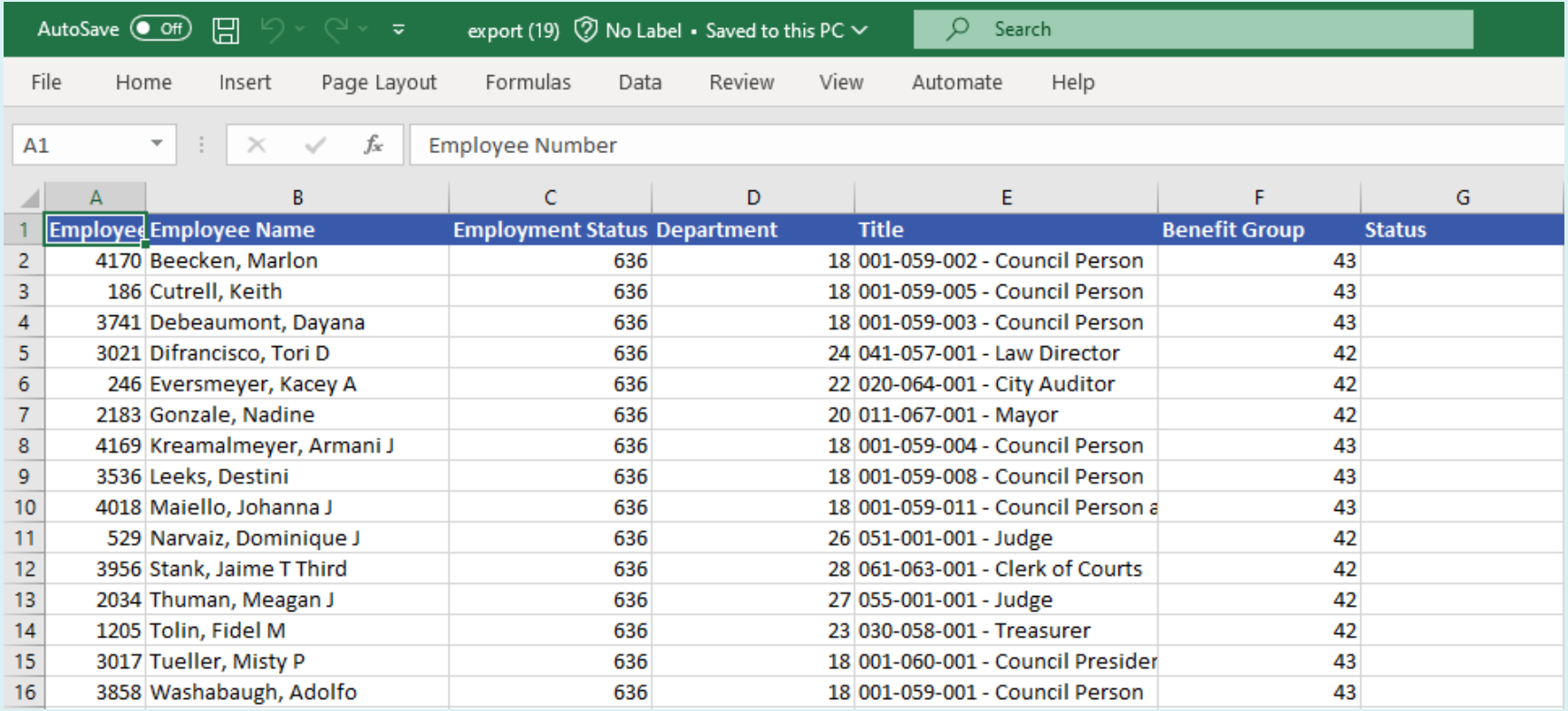

	A	B	C	D	E	F	G
1	Employee	Employee Name	Employment Status	Department	Title	Benefit Group	Status
2	4170	Beecken, Marlon	636	18	001-059-002 - Council Person	43	
3	186	Cutrell, Keith	636	18	001-059-005 - Council Person	43	
4	3741	Debeaumont, Dayana	636	18	001-059-003 - Council Person	43	
5	3021	Difrancisco, Tori D	636	24	041-057-001 - Law Director	42	
6	246	Eversmeyer, Kacey A	636	22	020-064-001 - City Auditor	42	
7	2183	Gonzale, Nadine	636	20	011-067-001 - Mayor	42	
8	4169	Kreamalmeyer, Armani J	636	18	001-059-004 - Council Person	43	
9	3536	Leeks, Destini	636	18	001-059-008 - Council Person	43	
10	4018	Maiello, Johanna J	636	18	001-059-011 - Council Person a	43	
11	529	Narvaiz, Dominique J	636	26	051-001-001 - Judge	42	
12	3956	Stank, Jaime T Third	636	28	061-063-001 - Clerk of Courts	42	
13	2034	Thuman, Meagan J	636	27	055-001-001 - Judge	42	
14	1205	Tolin, Fidel M	636	23	030-058-001 - Treasurer	42	
15	3017	Tueller, Misty P	636	18	001-060-001 - Council Presider	43	
16	3858	Washabaugh, Adolfo	636	18	001-059-001 - Council Person	43	

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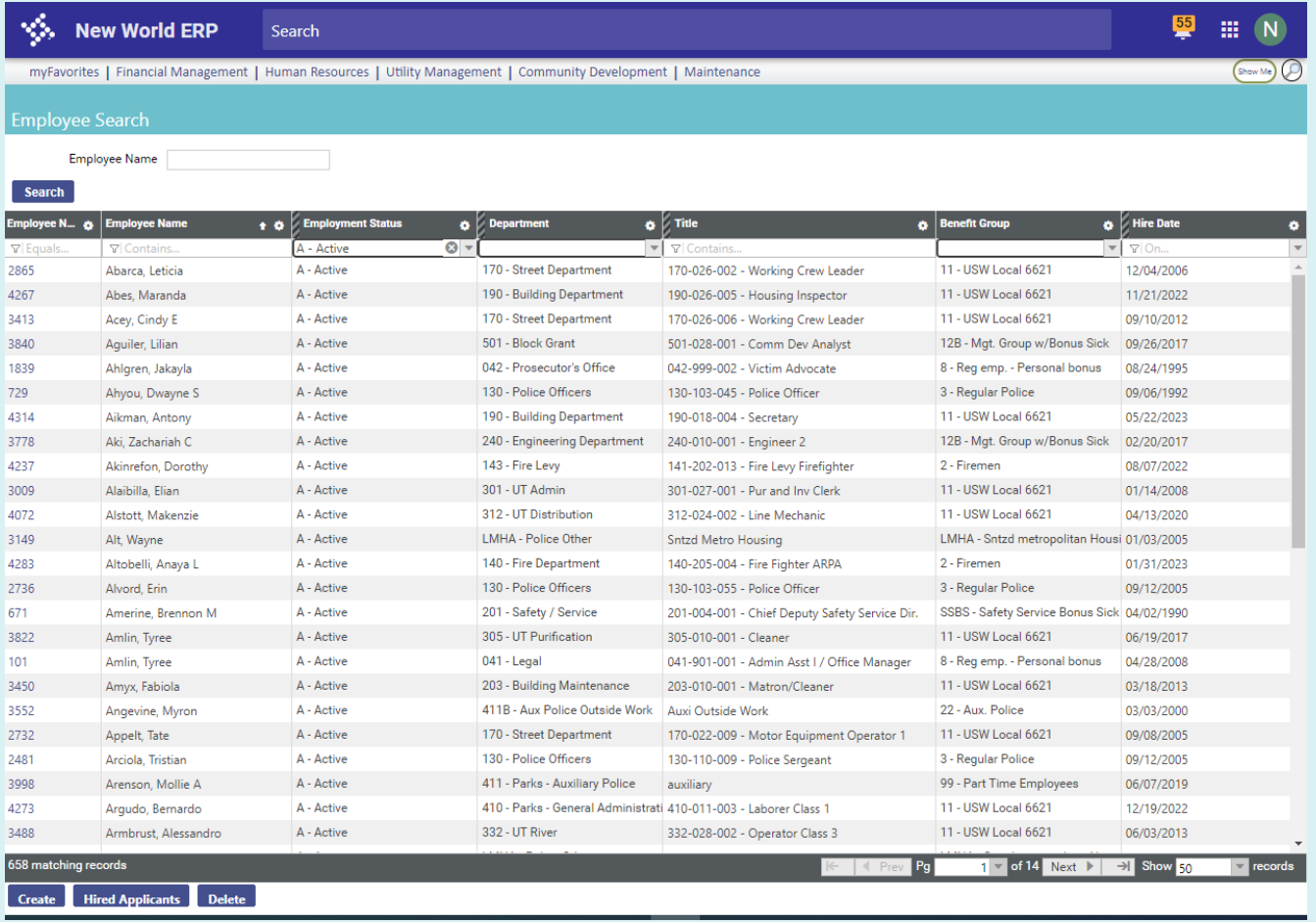

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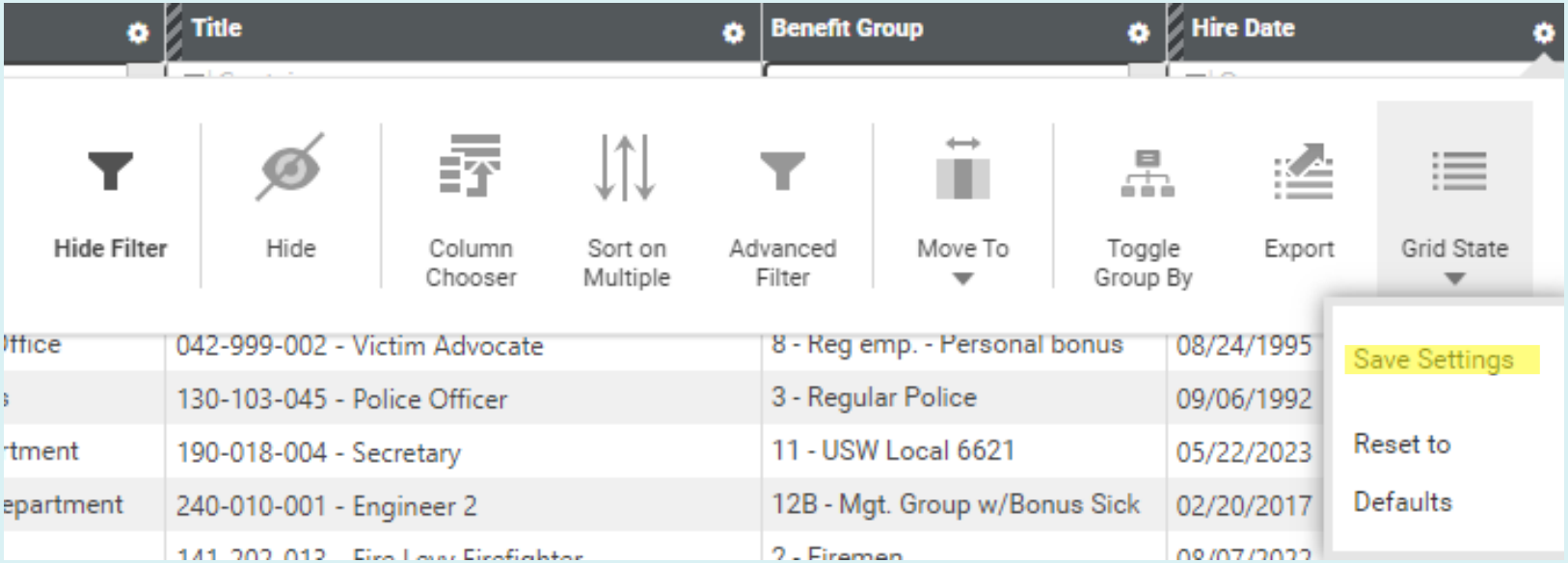
Feature Chooser



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Imports

- Import Benefit Data
- Import Deduction Data
- Import Adjustments
- Third Party Hours Import

CONNECT 24

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Scenario:

All full-time employees will be receiving a new Life Insurance benefit effective June 1st. The benefit code is created and must be added to the appropriate employees.

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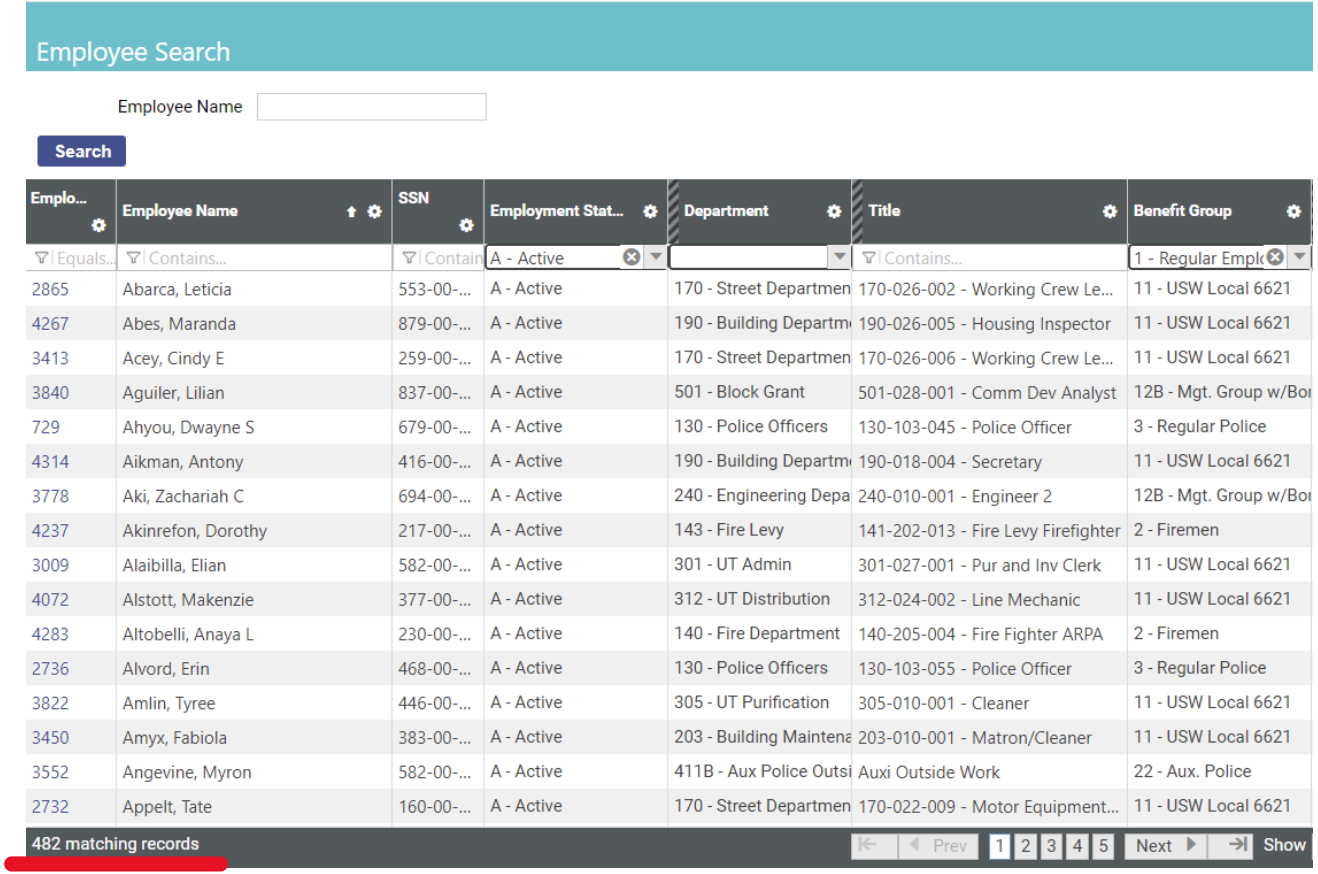

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“It's not the load that breaks you down. It's the way you carry it.” - *Lena Horne*

CONNECT 24

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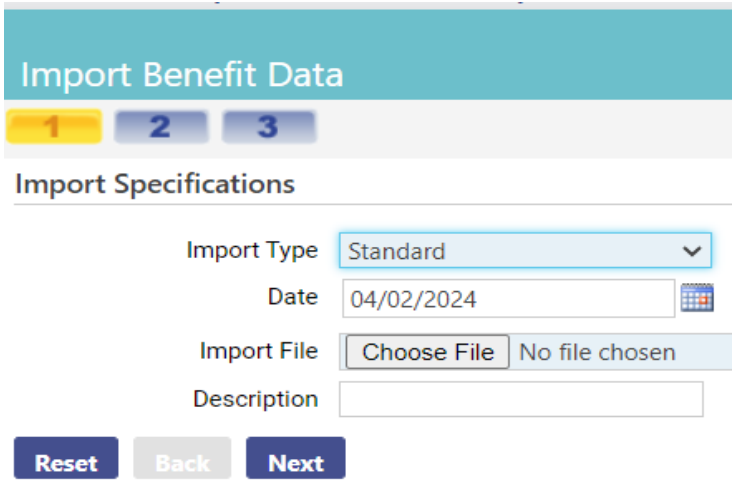
Import Benefit Data

Human Resources > Payroll Administrator Tasks > Import Benefit Data



- For Benefit Codes Only
- Cannot be in a Benefit Plan
- Can have different Start Date per Employee
- Can be Used to Stop Benefits in Workforce

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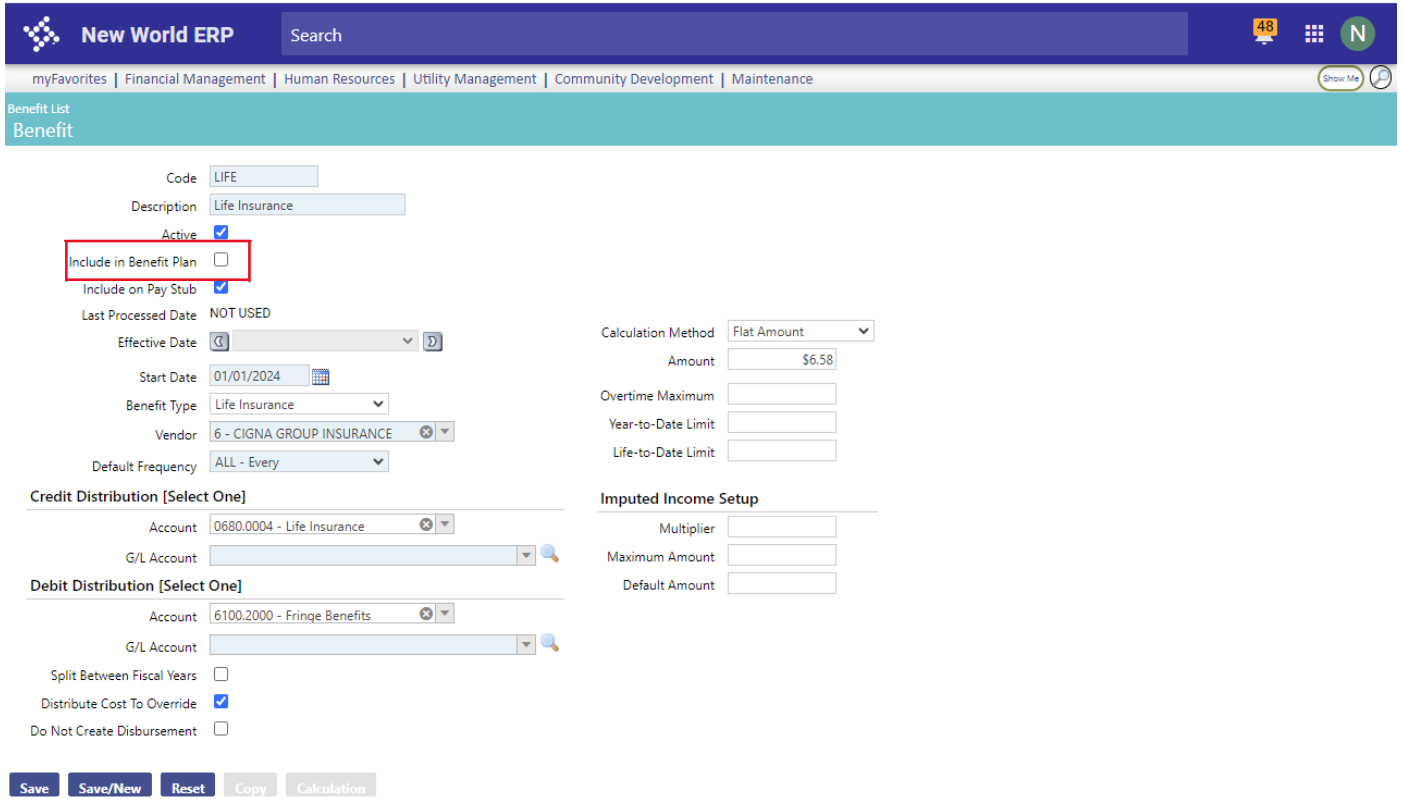
Is the Benefit Code Eligible for the Import?



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Creating the Import File

Must

- Be a CSV file
- Include Benefit Code
- Include Employee Number

Can

- Include Effective Date
- Include Override Amount/Percent
- Include Override Limit

Note

- If the Override Amount/Percent is 0 (zero), the existing Benefit is stopped.
- If a default Amount/Percent is not provided on the code, it must be added as an Override.

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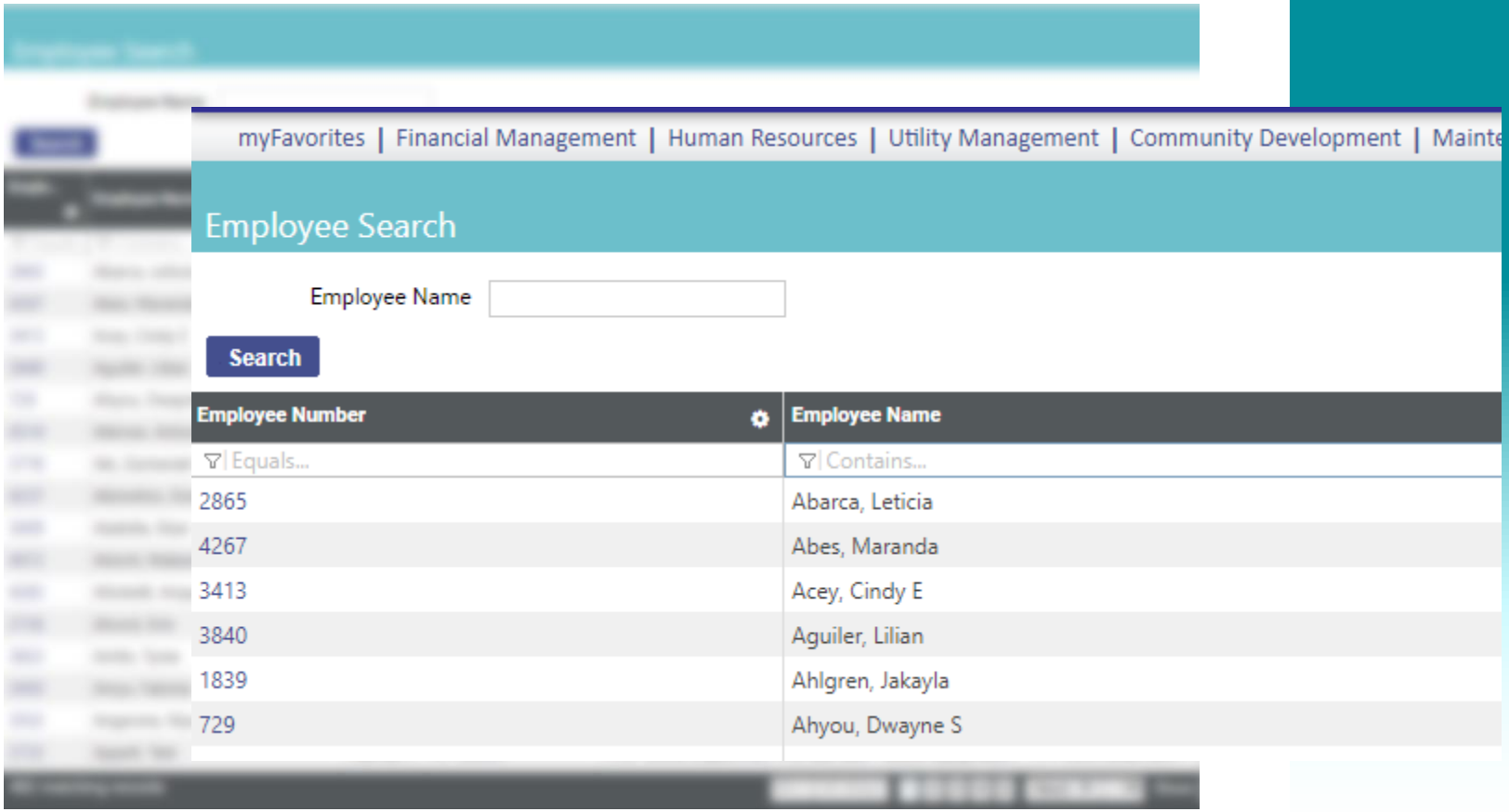

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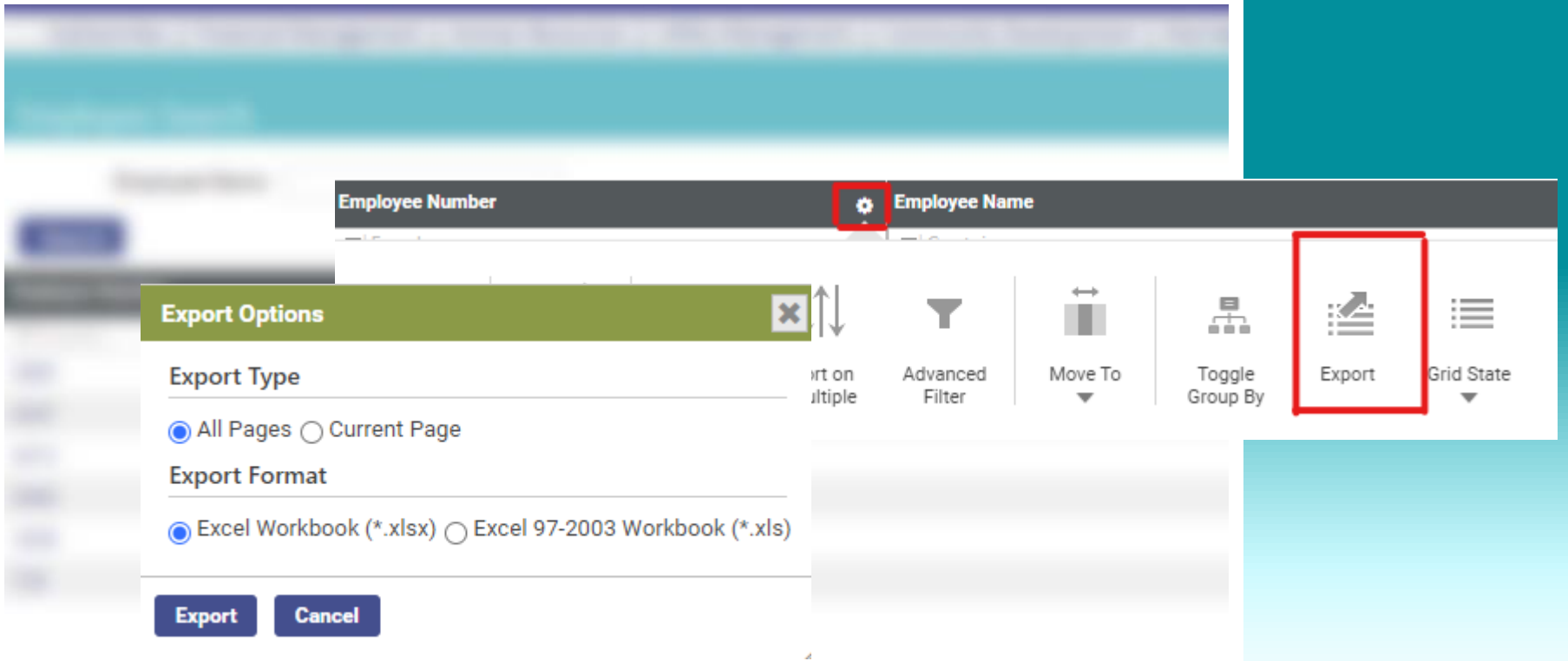

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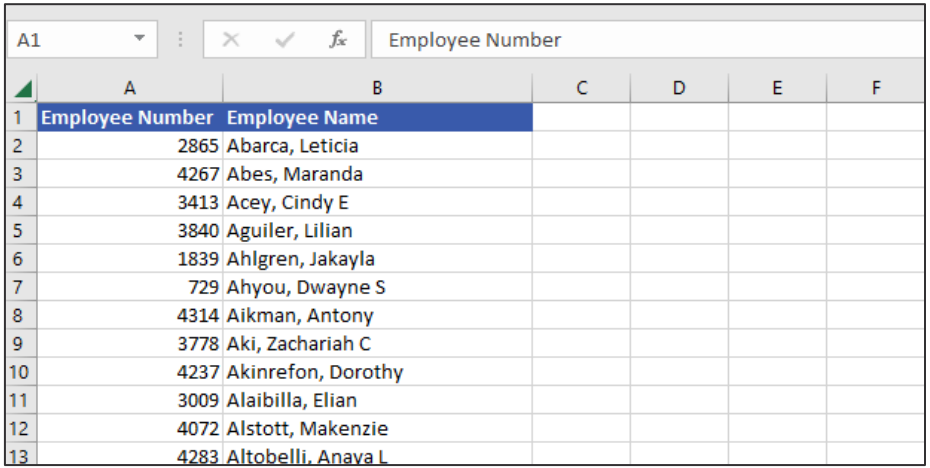
Creating the File to Import



	A	B	C	D	E	F
1	Employee Number	Employee Name				
2	2865	Abarca, Leticia				
3	4267	Abes, Maranda				
4	3413	Acey, Cindy E				
5	3840	Aguiler, Lilian				
6	1839	Ahlgren, Jakayla				
7	729	Ahyou, Dwayne S				
8	4314	Aikman, Antony				
9	3778	Aki, Zachariah C				
10	4237	Akinrefon, Dorothy				
11	3009	Alaibilla, Elian				
12	4072	Alstott, Makenzie				
13	4283	Altobelli, Anaya L				

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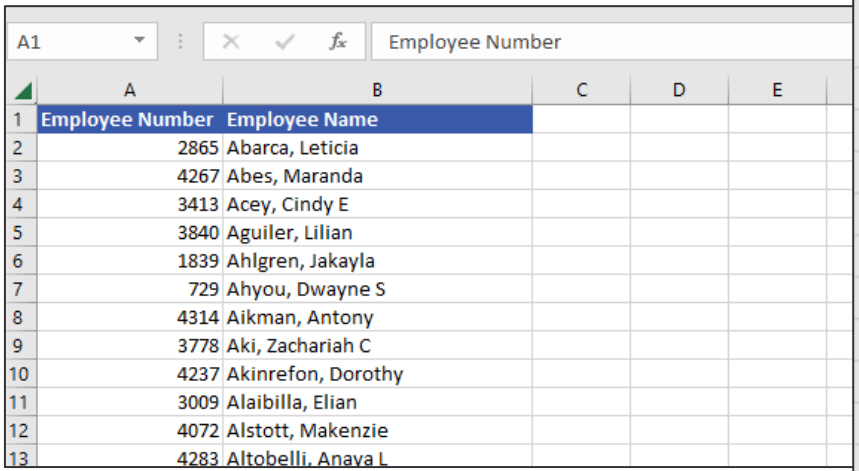
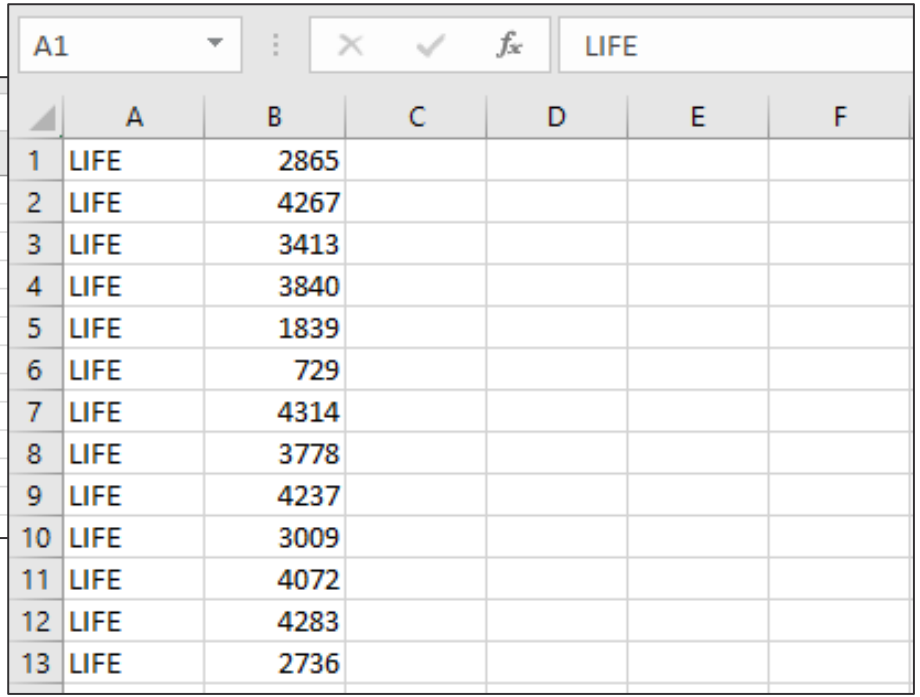
Creating the File to Import



	A	B	C	D	E
1	Employee Number	Employee Name			
2	2865	Abarca, Leticia			
3	4267	Abes, Maranda			
4	3413	Acey, Cindy E			
5	3840	Aguiler, Lilian			
6	1839	Ahlgren, Jakayla			
7	729	Ahyou, Dwayne S			
8	4314	Aikman, Antony			
9	3778	Aki, Zachariah C			
10	4237	Akinrefon, Dorothy			
11	3009	Alaibilla, Elian			
12	4072	Alstott, Makenzie			
13	4283	Altobelli, Anaya L			



	A	B	C	D	E	F
1	LIFE	2865				
2	LIFE	4267				
3	LIFE	3413				
4	LIFE	3840				
5	LIFE	1839				
6	LIFE	729				
7	LIFE	4314				
8	LIFE	3778				
9	LIFE	4237				
10	LIFE	3009				
11	LIFE	4072				
12	LIFE	4283				
13	LIFE	2736				

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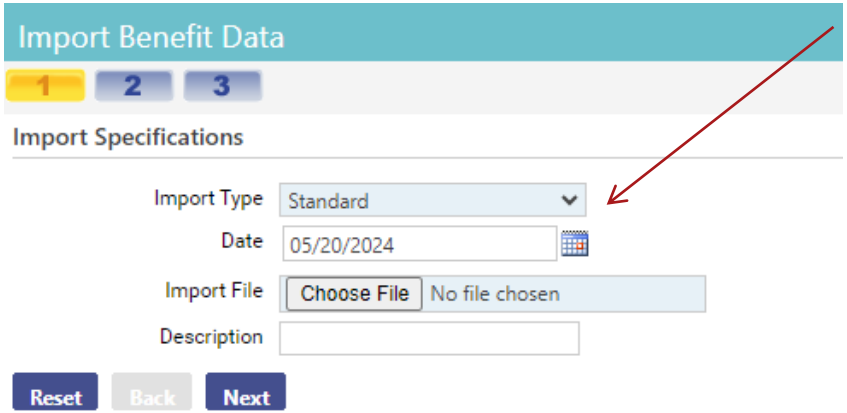
Importing the Data



Choose “Standard” from the Import Type dropdown

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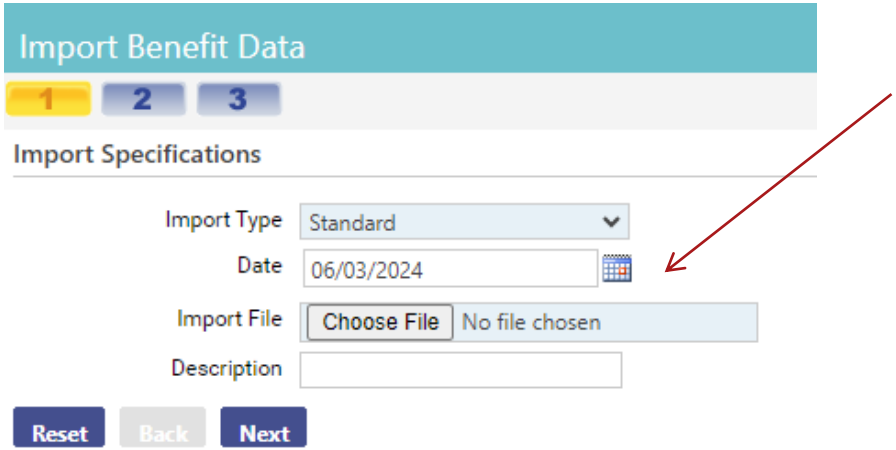
Importing the Data



Change your date to the first day of the pay period the benefit will begin

Note: If you added dates in your .csv file, they would override this date per employee.

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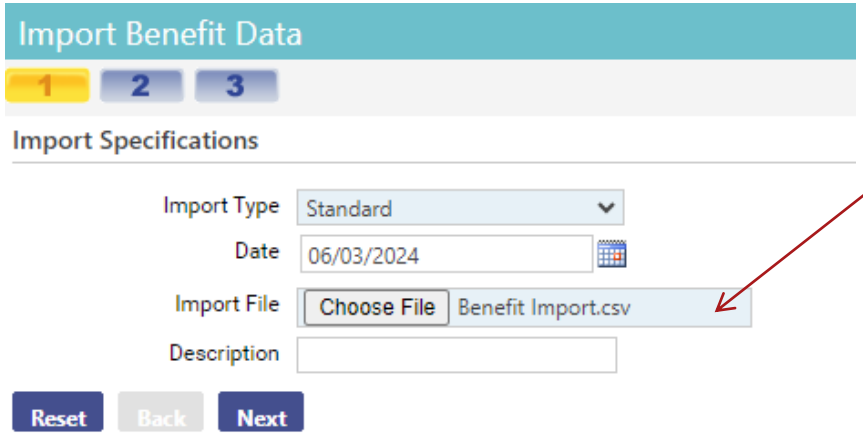
Importing the Data



Click on Choose File to select the .csv file to be Imported

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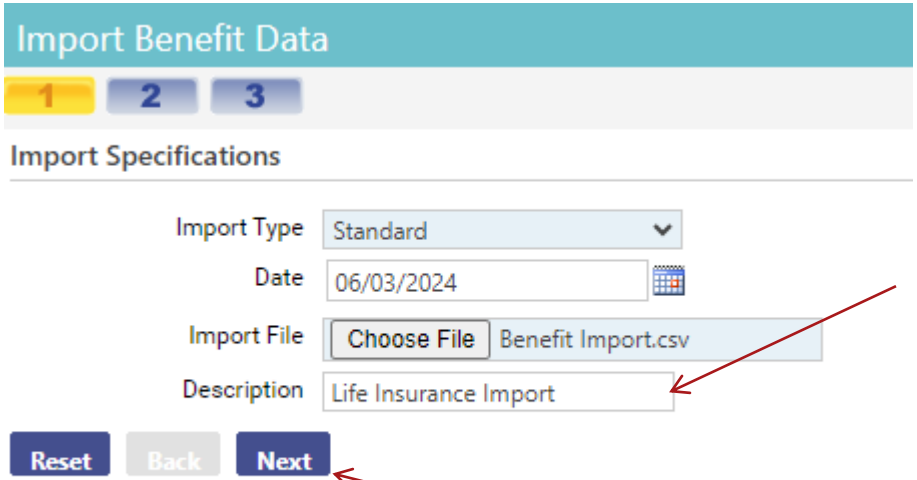
Importing the Data



Add a Unique Description

Click Next

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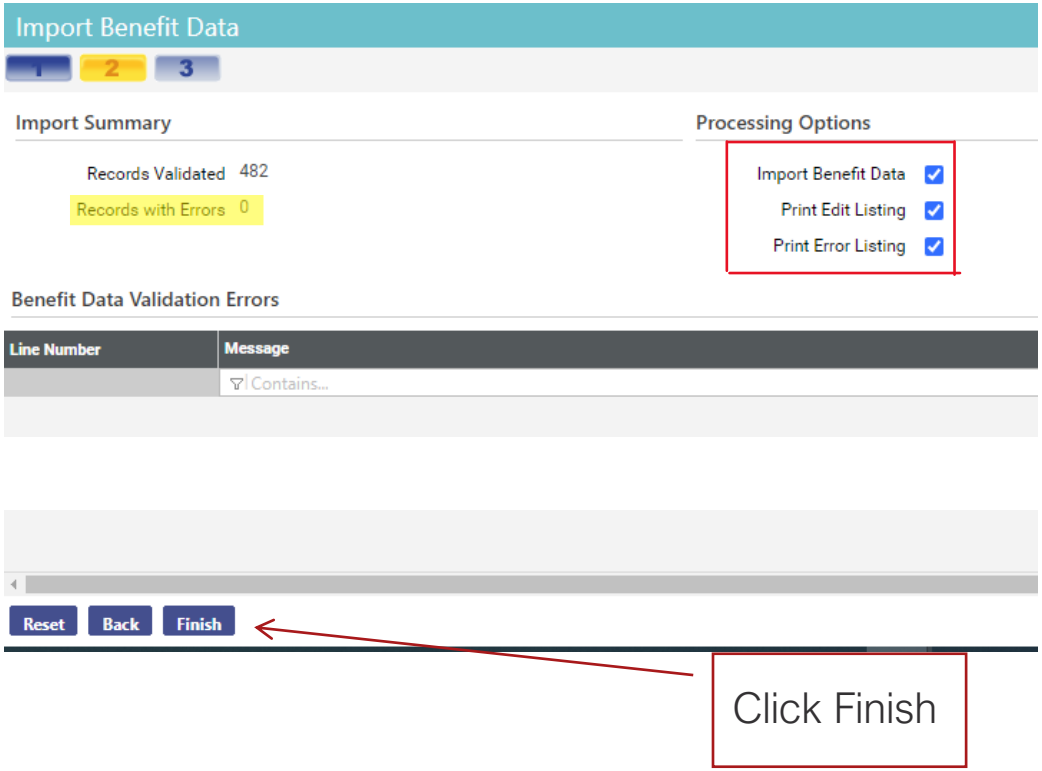
Importing the Data



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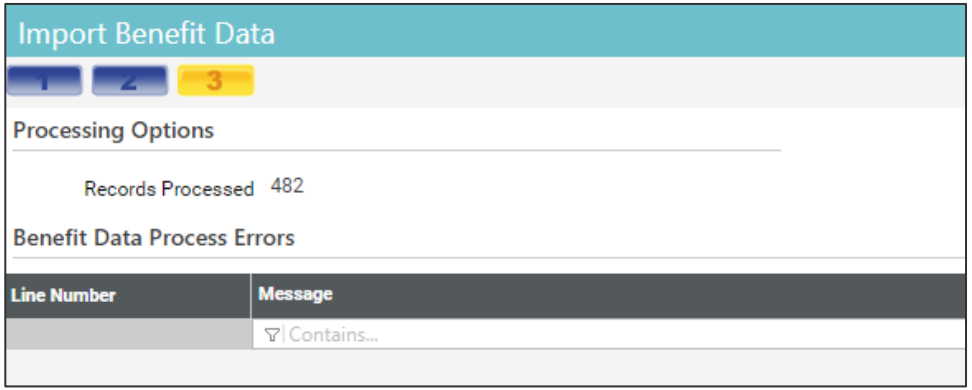
Success!



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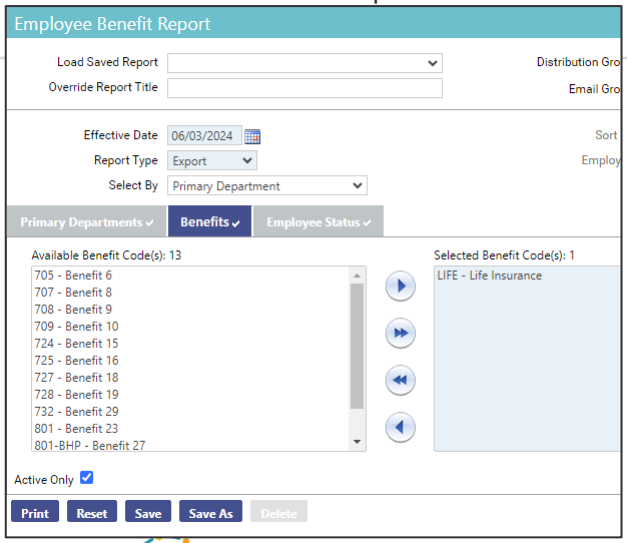
Always Double Check

Employee Benefit Report

HR > Reports > Employee Reports > Employee Benefit Report



Employee Nu...	Employe...	Depa...	Department Des...	Calcula...	Benefit	Effective D...	End Date	Declined	Last Use...	Default Fre...	Defaul...
2865	Abarca, Leticia	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4267	Abes, Maranda	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3413	Acey, Cindy E	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3840	Aguiler, Lilian	501	Block Grant	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
1839	Ahlgren, Jaka...	042	Prosecutor's Office	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
729	Ahyou, Dway...	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4314	Aikman, Anto...	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3778	Aki, Zacharia...	240	Engineering Depart...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4237	Akinrefon, Do...	143	Fire Levy	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3009	Alaibilla, Elian	301	UT Admin	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4072	Alstott, Make...	312	UT Distribution	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4283	Altobelli, Ana...	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
2736	Alvord, Erin	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3822	Amlin, Tyree	305	UT Purification	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
101	Amlin, Tyree	041	Legal	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3450	Amyx, Fabiola	203	Building Maintenan...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3552	Angevine, My...	411B	Aux Police Outside ...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
2732	Appelt, Tate	170	Street Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
2481	Arciola, Tristian	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4273	Argudo, Bern...	410	Parks - General Ad...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3488	Armbrust, Ale...	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3504	Aspden, Geor...	340	UT Landscape & Se...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3371	Ax, Quinten	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
923	Babauta, Fran...	130	Police Officers	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
917	Bacchus, Peyt...	140	Fire Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
4047	Badgley, Zoey	411B	Aux Police Outside ...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3012	Barnas, Jackie...	410	Parks - General Ad...	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
905	Bassi, Aiden P	190	Building Department	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3707	Bastura, Regan	020	Auditor's Office	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3766	Baumfalk, Tra...	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58
3659	Beach, Zion	332	UT River	Flat Amount	LIFE - Life Insurance	06/03/2024	12/31/9999	No		ALL - Every	$6.58

1 - 50 of 482 records

Prev 1 2 3 4 5 Next

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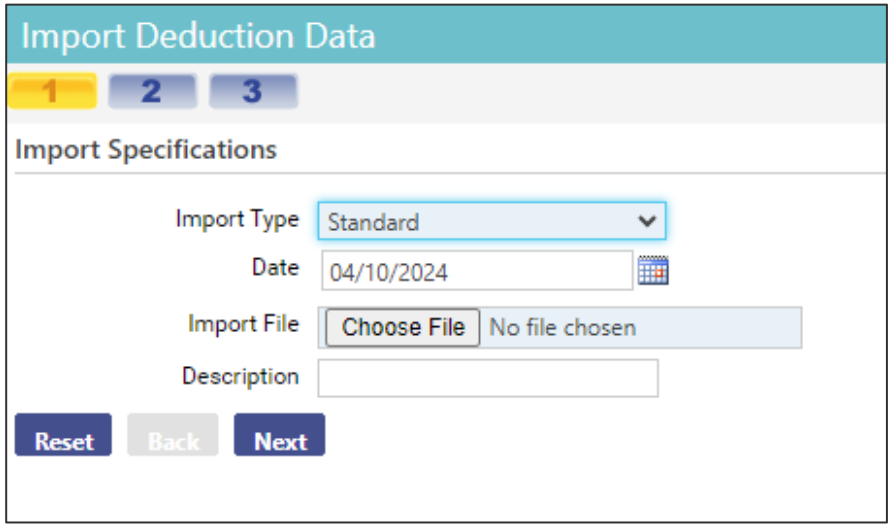
Import Deduction Data

Human Resources > Payroll Administrator Tasks > Import Deduction Data



- For Deduction Codes Only
- Cannot be in a Benefit Plan
- Can have different Start Date per Employee
- Can be Used to Stop Deductions in Workforce

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Creating the Import File

Must

- Be a CSV file
- Include Deduction Code
- Include Employee Number

Can

- Include Effective Date
- Include Override Amount/Percent
- Include Override Limit

Note

- If the Override Amount/Percent is 0 (zero), the existing Deduction is stopped.
- If a default Amount/Percent is not provided on the code, it must be added as an Override.

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Scenario:

Employees enrolled in FSA must re-enroll every year. Enrollment occurs through the provider. To ensure that employees FSA deduction doesn't continue into the next year, you want to place an end date on the deduction in Workforce.

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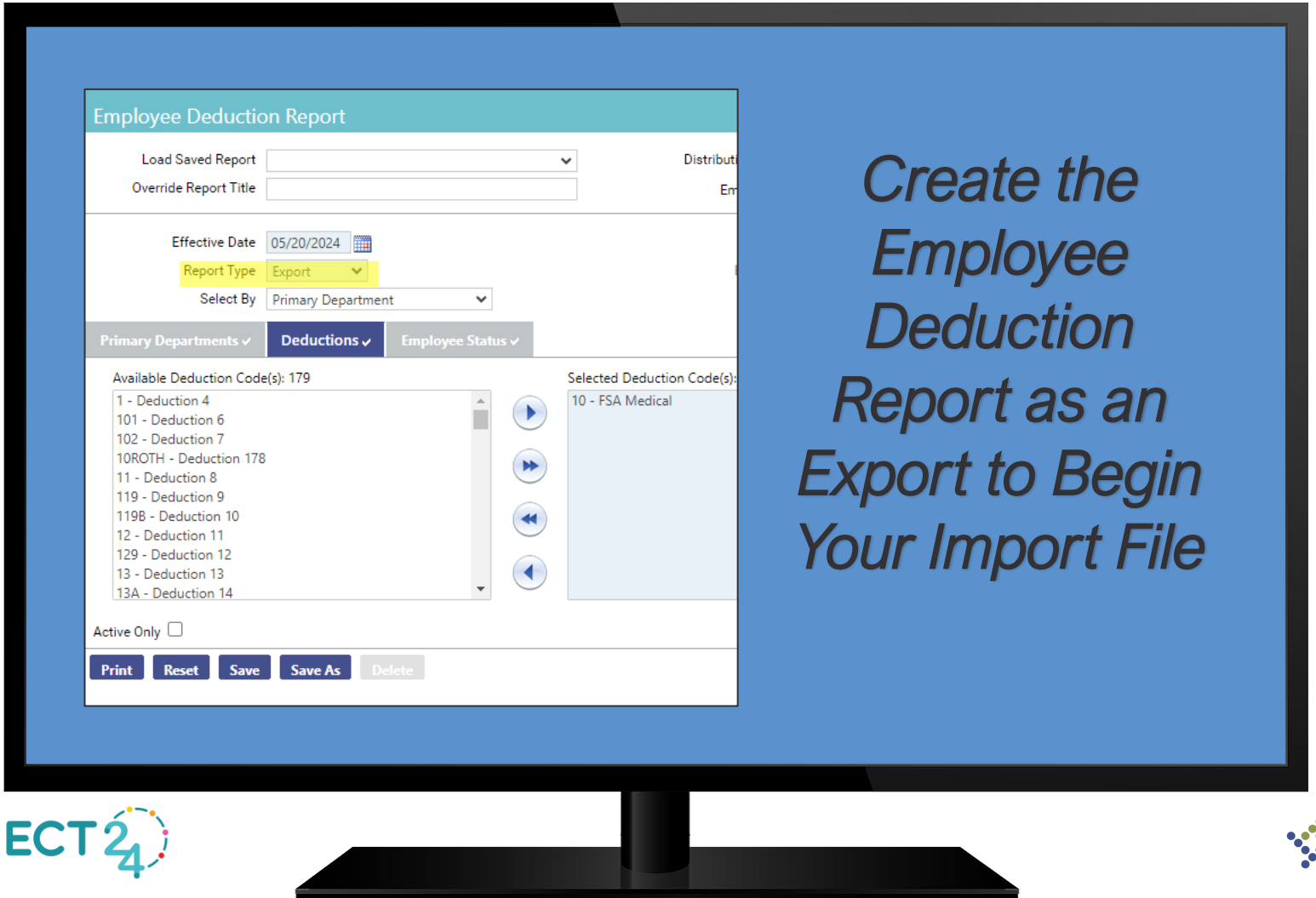

Create the Employee Deduction Report as an Export to Begin Your Import File

CONNECT 24

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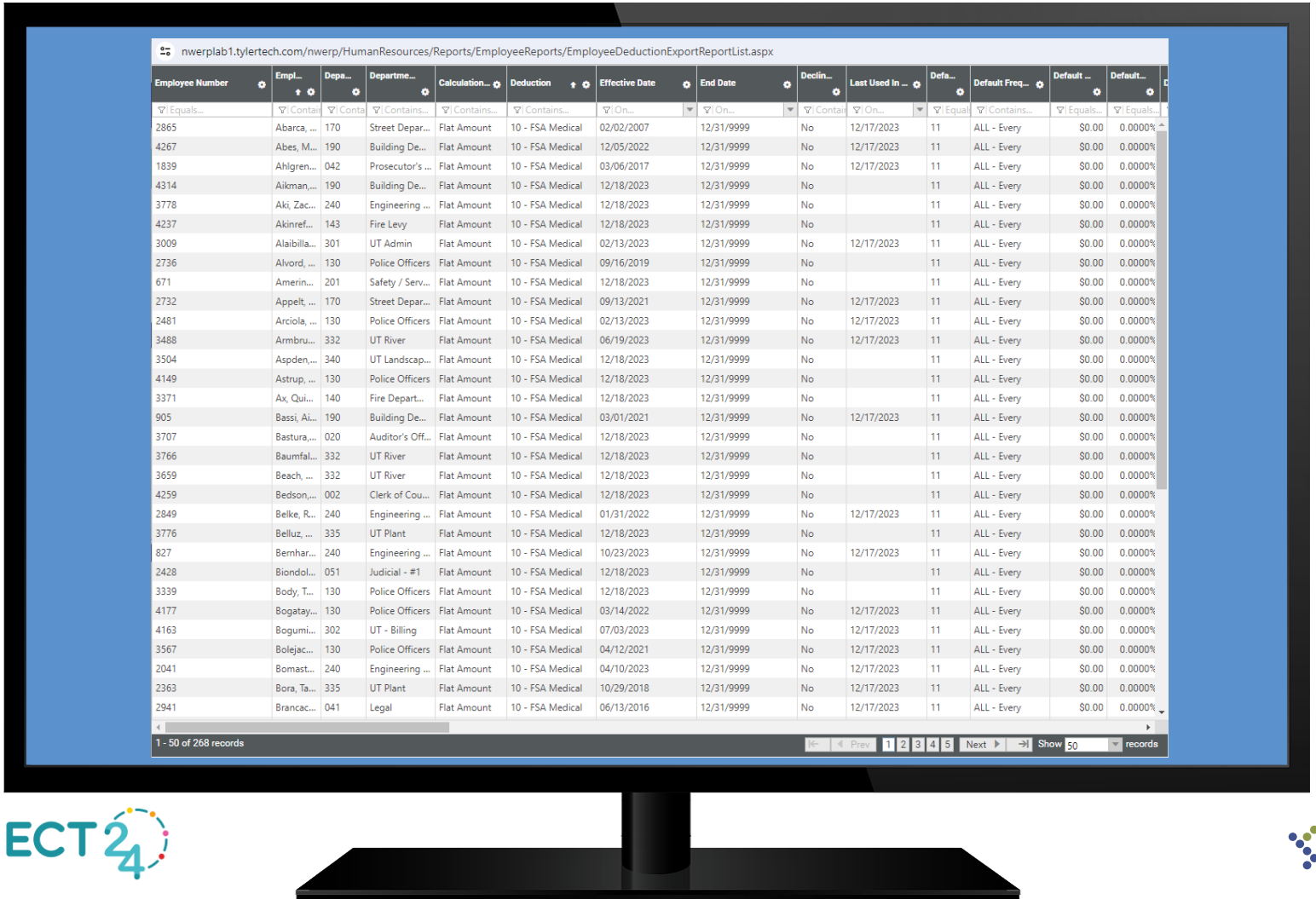

Employee Number	Empl...	Depa...	Departme...	Calculation...	Deduction	Effective Date	End Date	Declin...	Last Used In ...	Defa...	Default Freq...	Default ...	Default...
2865	Abarca, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	02/02/2007	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
4267	Abes, M...	190	Building De...	Flat Amount	10 - FSA Medical	12/05/2022	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
1839	Ahlgren...	042	Prosecutor's ...	Flat Amount	10 - FSA Medical	03/06/2017	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
4314	Aikman,...	190	Building De...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3778	Aki, Zac...	240	Engineering ...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
4237	Akinref...	143	Fire Levy	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3009	Alaibilla...	301	UT Admin	Flat Amount	10 - FSA Medical	02/13/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2736	Alvord, ...	130	Police Officers	Flat Amount	10 - FSA Medical	09/16/2019	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
671	Amerin...	201	Safety / Serv...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
2732	Appelt, ...	170	Street Depar...	Flat Amount	10 - FSA Medical	09/13/2021	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2481	Arciola, ...	130	Police Officers	Flat Amount	10 - FSA Medical	02/13/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
3488	Armbru...	332	UT River	Flat Amount	10 - FSA Medical	06/19/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
3504	Aspden,...	340	UT Landscap...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
4149	Astrup, ...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3371	Ax, Qui...	140	Fire Depart...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
905	Bassi, Ai...	190	Building De...	Flat Amount	10 - FSA Medical	03/01/2021	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
3707	Bastura,...	020	Auditor's Off...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3766	Baumfal...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3659	Beach, ...	332	UT River	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
4259	Bedson,...	002	Clerk of Cou...	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
2849	Belke, R...	240	Engineering ...	Flat Amount	10 - FSA Medical	01/31/2022	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
3776	Belluz, ...	335	UT Plant	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
827	Bernhar...	240	Engineering ...	Flat Amount	10 - FSA Medical	10/23/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2428	Biondol...	051	Judicial - #1	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
3339	Body, T...	130	Police Officers	Flat Amount	10 - FSA Medical	12/18/2023	12/31/9999	No		11	ALL - Every	$0.00	0.0000%
4177	Bogatay...	130	Police Officers	Flat Amount	10 - FSA Medical	03/14/2022	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
4163	Bogumi...	302	UT - Billing	Flat Amount	10 - FSA Medical	07/03/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
3567	Bolejac...	130	Police Officers	Flat Amount	10 - FSA Medical	04/12/2021	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2041	Bomast...	240	Engineering ...	Flat Amount	10 - FSA Medical	04/10/2023	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2363	Bora, Ta...	335	UT Plant	Flat Amount	10 - FSA Medical	10/29/2018	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%
2941	Brancac...	041	Legal	Flat Amount	10 - FSA Medical	06/13/2016	12/31/9999	No	12/17/2023	11	ALL - Every	$0.00	0.0000%

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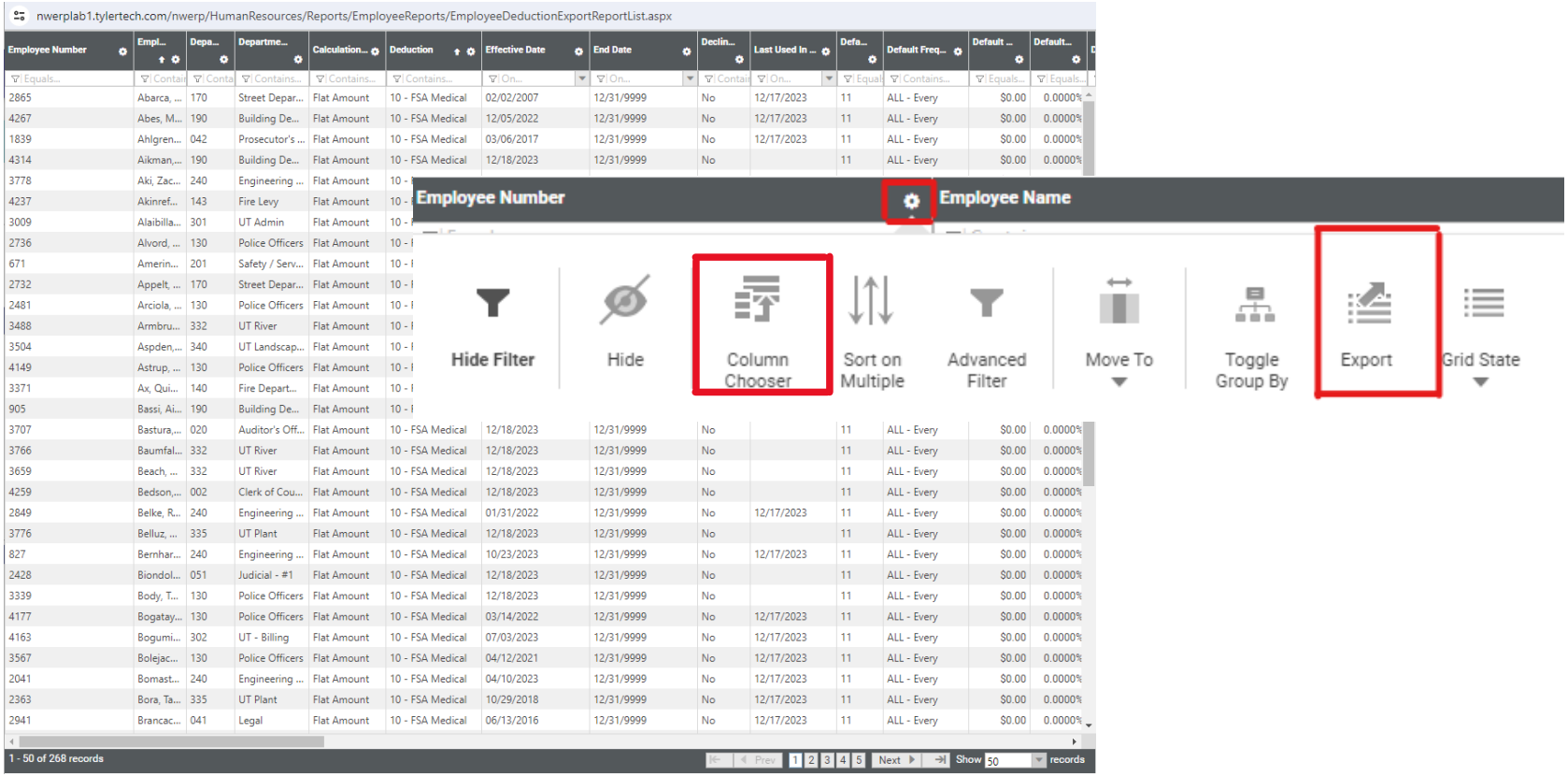

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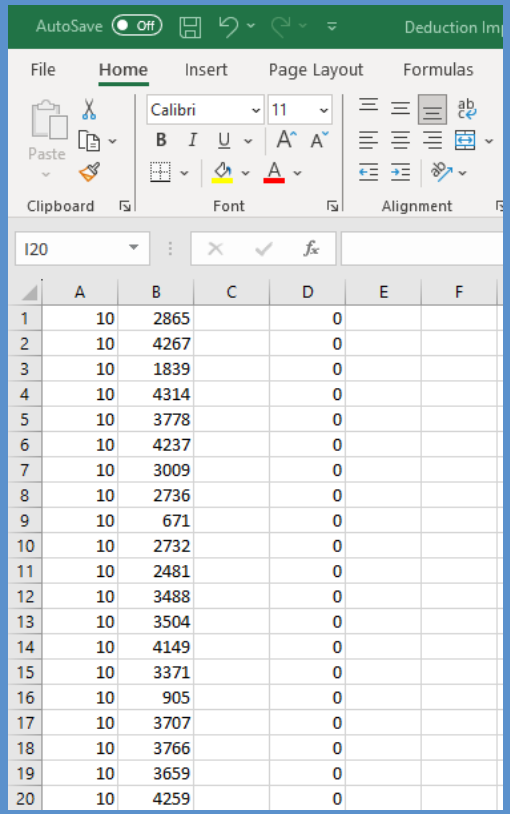

	A	B	C	D	E	F
1	10	2865		0		
2	10	4267		0		
3	10	1839		0		
4	10	4314		0		
5	10	3778		0		
6	10	4237		0		
7	10	3009		0		
8	10	2736		0		
9	10	671		0		
10	10	2732		0		
11	10	2481		0		
12	10	3488		0		
13	10	3504		0		
14	10	4149		0		
15	10	3371		0		
16	10	905		0		
17	10	3707		0		
18	10	3766		0		
19	10	3659		0		
20	10	4259		0		

- To add an End Date on the Deduction in Workforce, place zeroes in the override column
- Remember to remove the Header row
- Always save the file as .CSV

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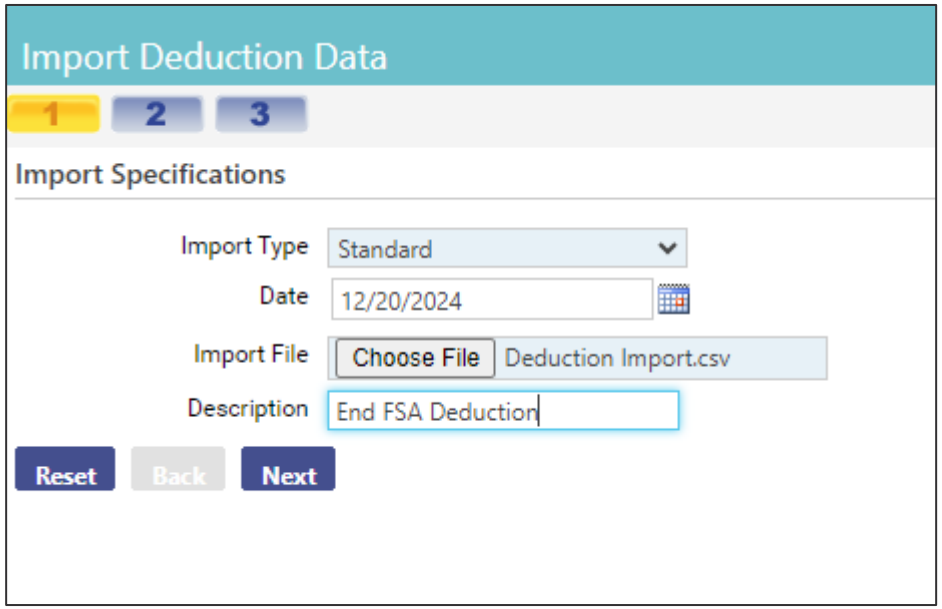
Importing the Data



Because we want this Import to END the deduction, the date entered here will be the end date for the deduction on the employees in Workforce.

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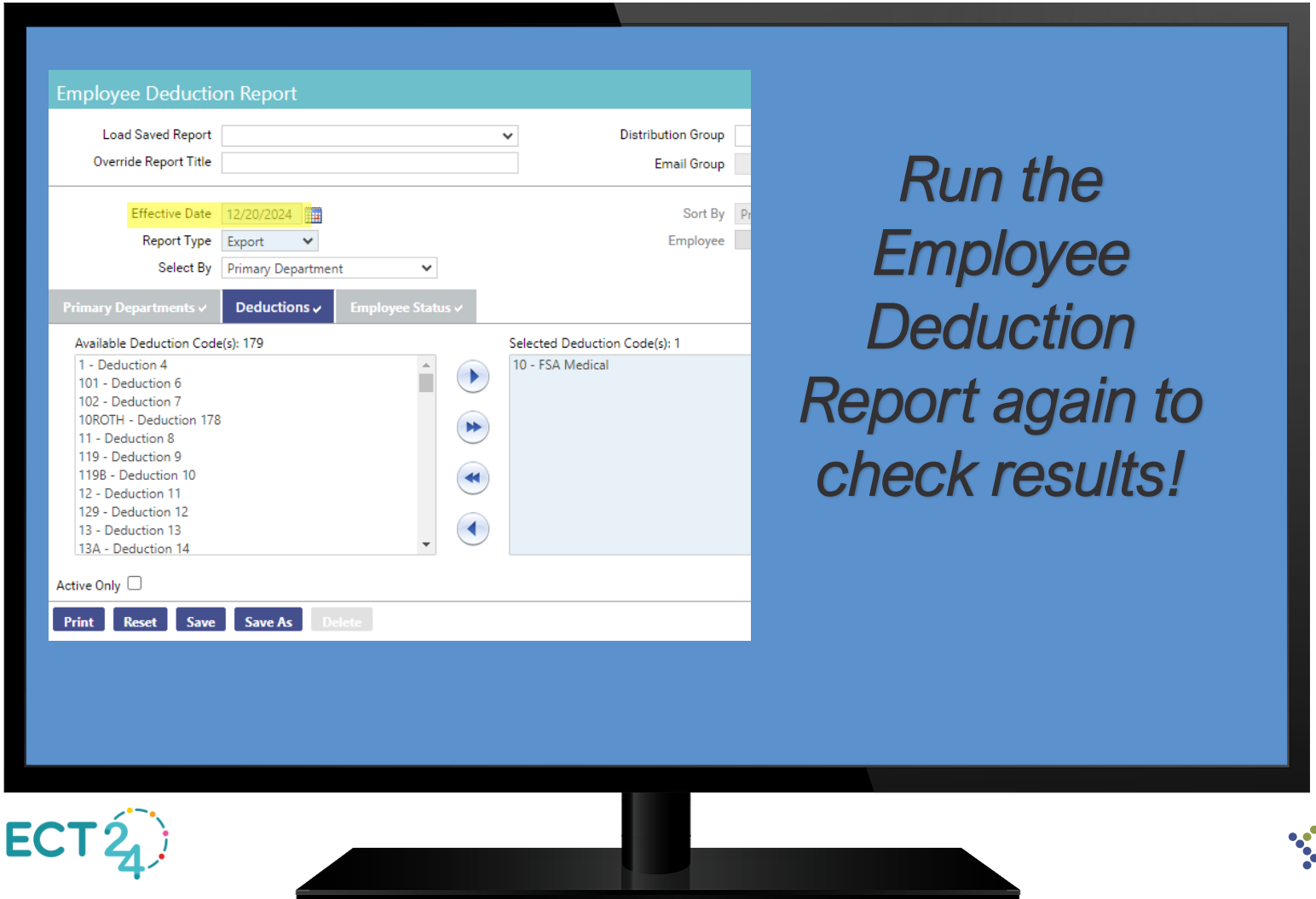

Run the Employee Deduction Report again to check results!

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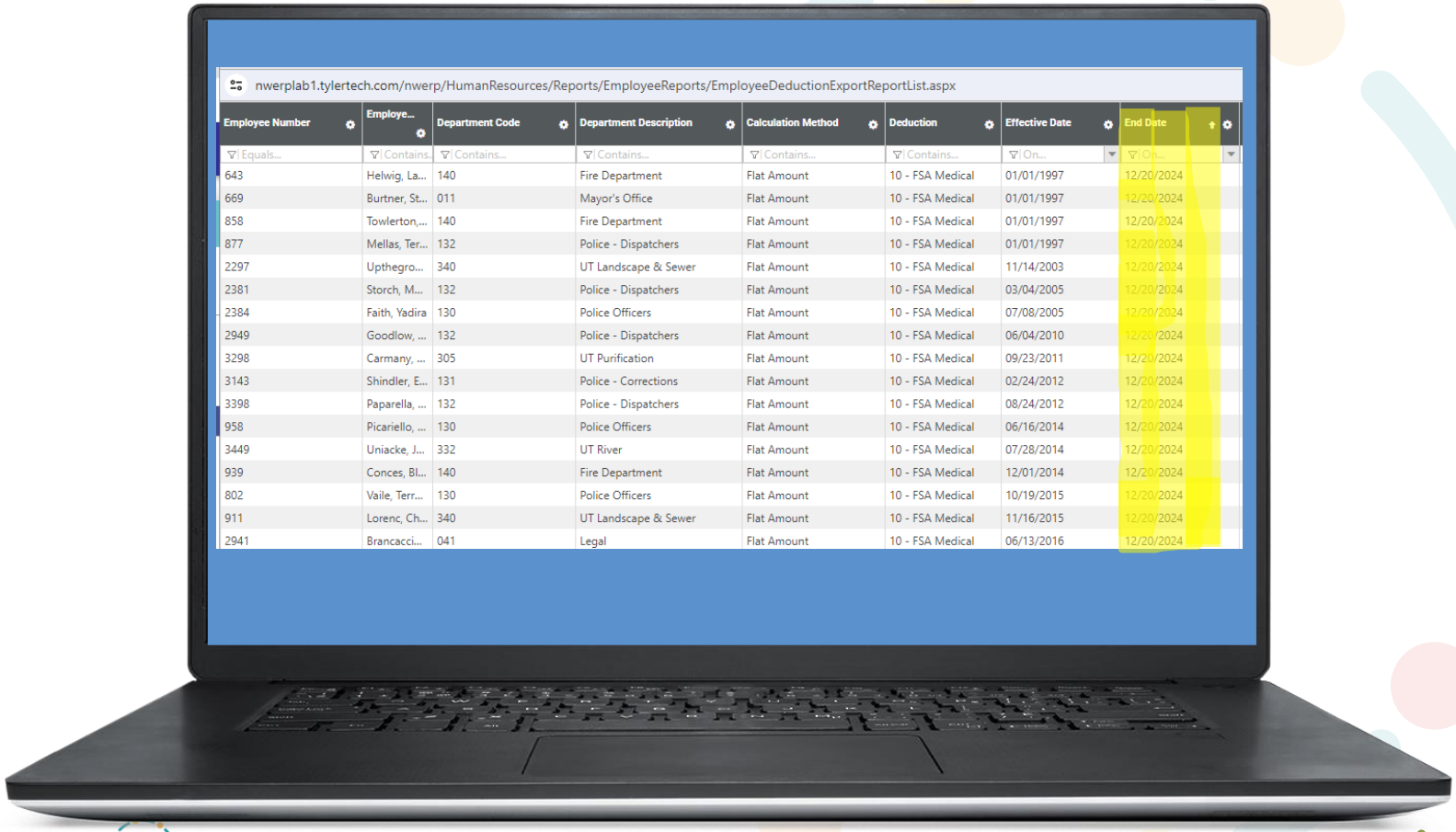

Employee Number	Employe...	Department Code	Department Description	Calculation Method	Deduction	Effective Date	End Date
Equals...	Contains...	Contains...	Contains...	Contains...	Contains...	On...	On...
643	Helwig, La...	140	Fire Department	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
669	Burtner, St...	011	Mayor's Office	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
858	Towlerton,...	140	Fire Department	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
877	Mellas, Ter...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	01/01/1997	12/20/2024
2297	Upthegro...	340	UT Landscape & Sewer	Flat Amount	10 - FSA Medical	11/14/2003	12/20/2024
2381	Storch, M...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	03/04/2005	12/20/2024
2384	Faith, Yadira	130	Police Officers	Flat Amount	10 - FSA Medical	07/08/2005	12/20/2024
2949	Goodlow, ...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	06/04/2010	12/20/2024
3298	Carmany, ...	305	UT Purification	Flat Amount	10 - FSA Medical	09/23/2011	12/20/2024
3143	Shindler, E...	131	Police - Corrections	Flat Amount	10 - FSA Medical	02/24/2012	12/20/2024
3398	Paparella, ...	132	Police - Dispatchers	Flat Amount	10 - FSA Medical	08/24/2012	12/20/2024
958	Picariello, ...	130	Police Officers	Flat Amount	10 - FSA Medical	06/16/2014	12/20/2024
3449	Uniacke, J...	332	UT River	Flat Amount	10 - FSA Medical	07/28/2014	12/20/2024
939	Conces, Bl...	140	Fire Department	Flat Amount	10 - FSA Medical	12/01/2014	12/20/2024
802	Vaile, Terr...	130	Police Officers	Flat Amount	10 - FSA Medical	10/19/2015	12/20/2024
911	Lorenc, Ch...	340	UT Landscape & Sewer	Flat Amount	10 - FSA Medical	11/16/2015	12/20/2024
2941	Brancacci...	041	Legal	Flat Amount	10 - FSA Medical	06/13/2016	12/20/2024

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Adjustment Import

Can

- Adjust Hours Codes
- Include Multiple Dates
- Have Multiple Entries for One Employee

Does Not

- Create a Journal Entry
- Affect an Employee's Actual Pay
- Affect an Employee's W2 wages

Primary Use

Adjust Accrual Balances for a Large Number of Employees

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Testing Your Adjustments

When making a large number of adjustments with an import, you should always compare the “before” with the “after”.

Use the Accrual Balance Report for adjustments to accrual balances.

Use Hours Analysis for other types of hours adjustments.

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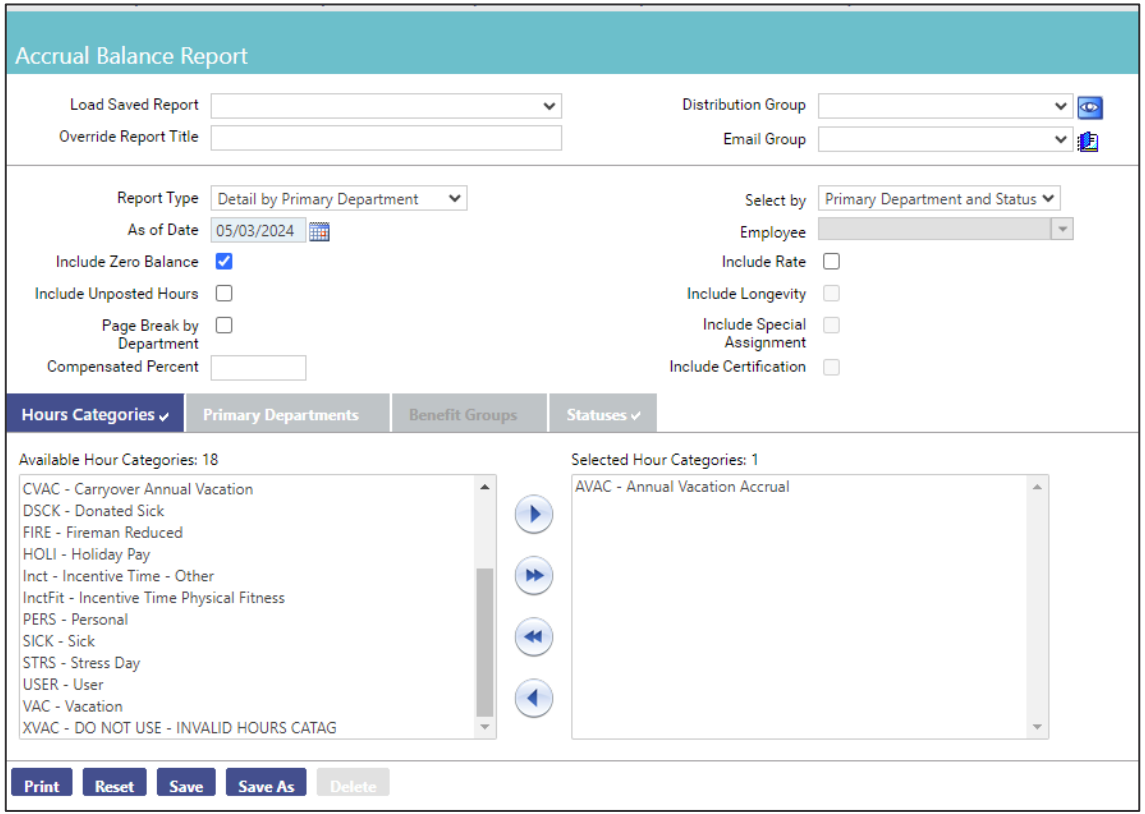
Accrual Balance Report

Human Resources > Reports > Management Reports > Accrual Balance Report



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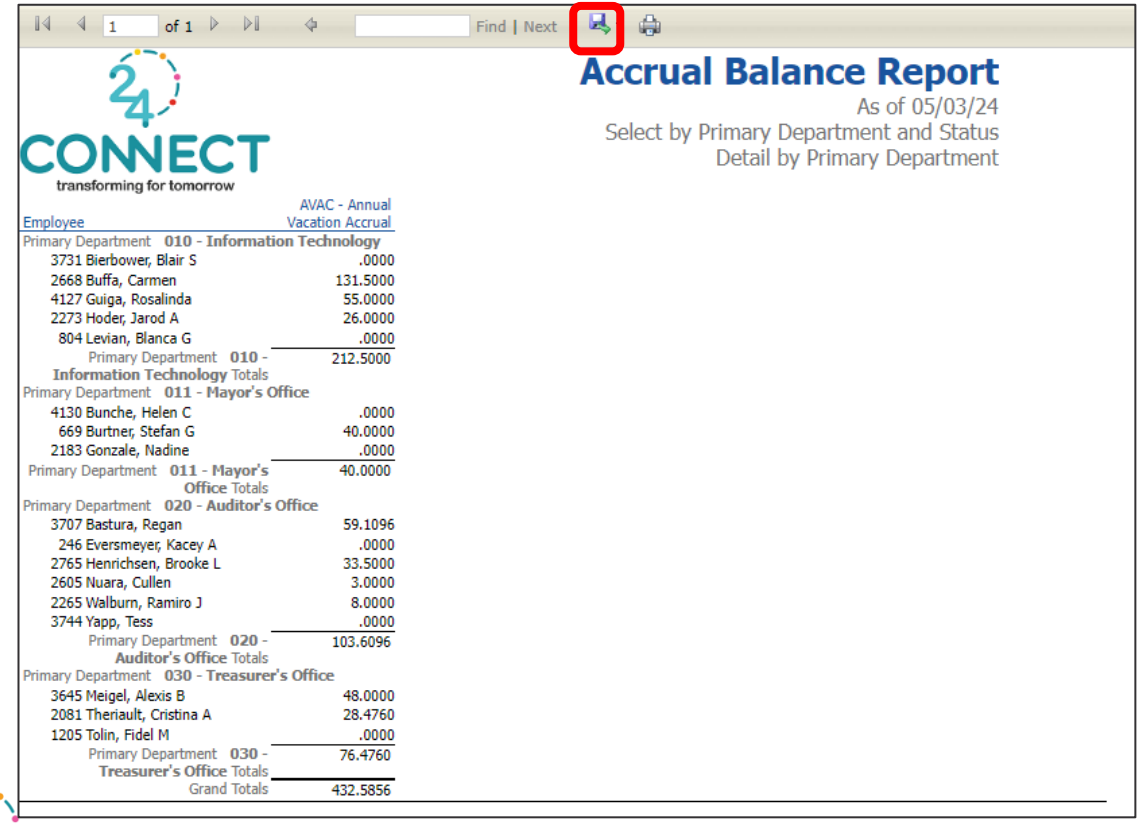
Accrual Balance Report Before Performing the Adjustment Import



Employee	AVAC - Annual Vacation Accrual
Primary Department **010 - Information Technology**	
3731 Bierbower, Blair S	.0000
2668 Buffa, Carmen	131.5000
4127 Guiga, Rosalinda	55.0000
2273 Hoder, Jarod A	26.0000
804 Levian, Blanca G	.0000
Primary Department **010 - Information Technology** Totals	212.5000
Primary Department **011 - Mayor's Office**	
4130 Bunche, Helen C	.0000
669 Burtner, Stefan G	40.0000
2183 Gonzale, Nadine	.0000
Primary Department **011 - Mayor's Office** Totals	40.0000
Primary Department **020 - Auditor's Office**	
3707 Bastura, Regan	59.1096
246 Eversmeyer, Kacey A	.0000
2765 Henrichsen, Brooke L	33.5000
2605 Nuara, Cullen	3.0000
2265 Walburn, Ramiro J	8.0000
3744 Yapp, Tess	.0000
Primary Department **020 - Auditor's Office** Totals	103.6096
Primary Department **030 - Treasurer's Office**	
3645 Meigel, Alexis B	48.0000
2081 Theriault, Cristina A	28.4760
1205 Tolin, Fidel M	.0000
Primary Department **030 - Treasurer's Office** Totals	76.4760
Grand Totals	432.5856

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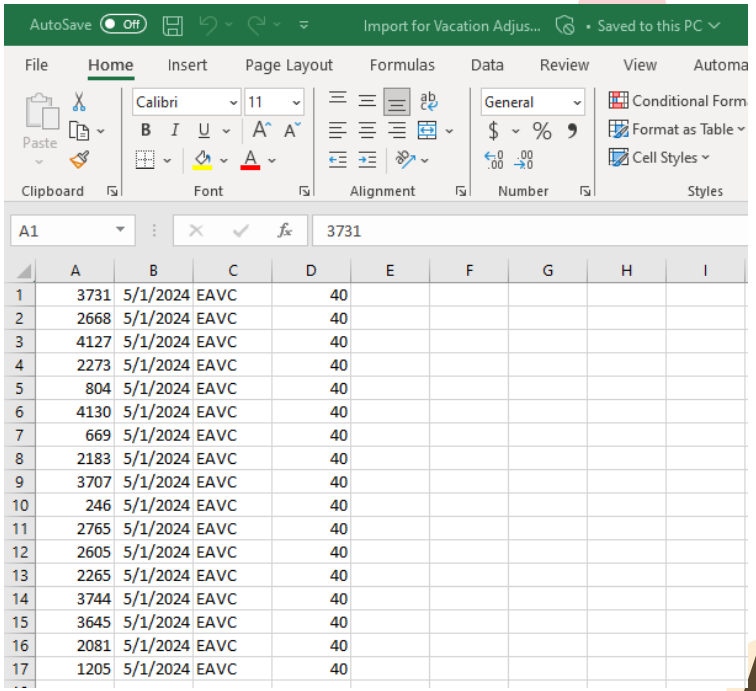
Completed .CSV File for Import



	A	B	C	D	E	F	G	H	I
1	3731	5/1/2024	EAVC	40					
2	2668	5/1/2024	EAVC	40					
3	4127	5/1/2024	EAVC	40					
4	2273	5/1/2024	EAVC	40					
5	804	5/1/2024	EAVC	40					
6	4130	5/1/2024	EAVC	40					
7	669	5/1/2024	EAVC	40					
8	2183	5/1/2024	EAVC	40					
9	3707	5/1/2024	EAVC	40					
10	246	5/1/2024	EAVC	40					
11	2765	5/1/2024	EAVC	40					
12	2605	5/1/2024	EAVC	40					
13	2265	5/1/2024	EAVC	40					
14	3744	5/1/2024	EAVC	40					
15	3645	5/1/2024	EAVC	40					
16	2081	5/1/2024	EAVC	40					
17	1205	5/1/2024	EAVC	40					

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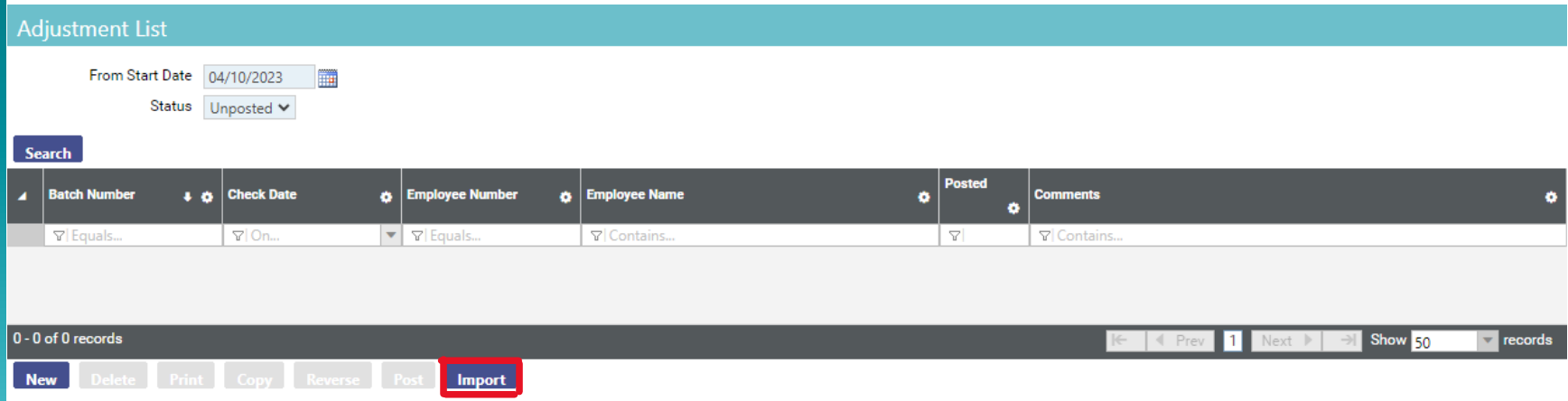
Adjustment Import

Human Resources > Payroll Administrator Tasks > Adjustment Processing



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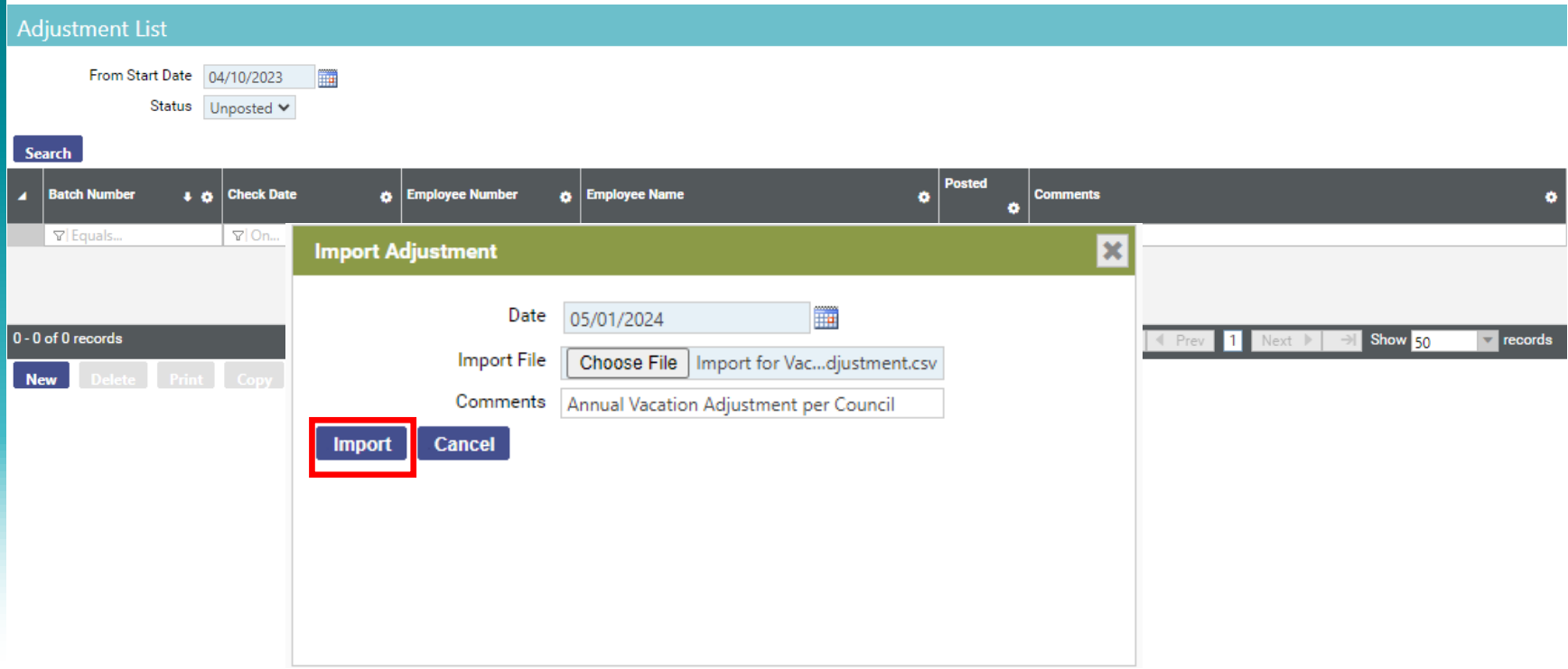
Adjustment Import

Human Resources > Payroll Administrator Tasks > Adjustment Processing



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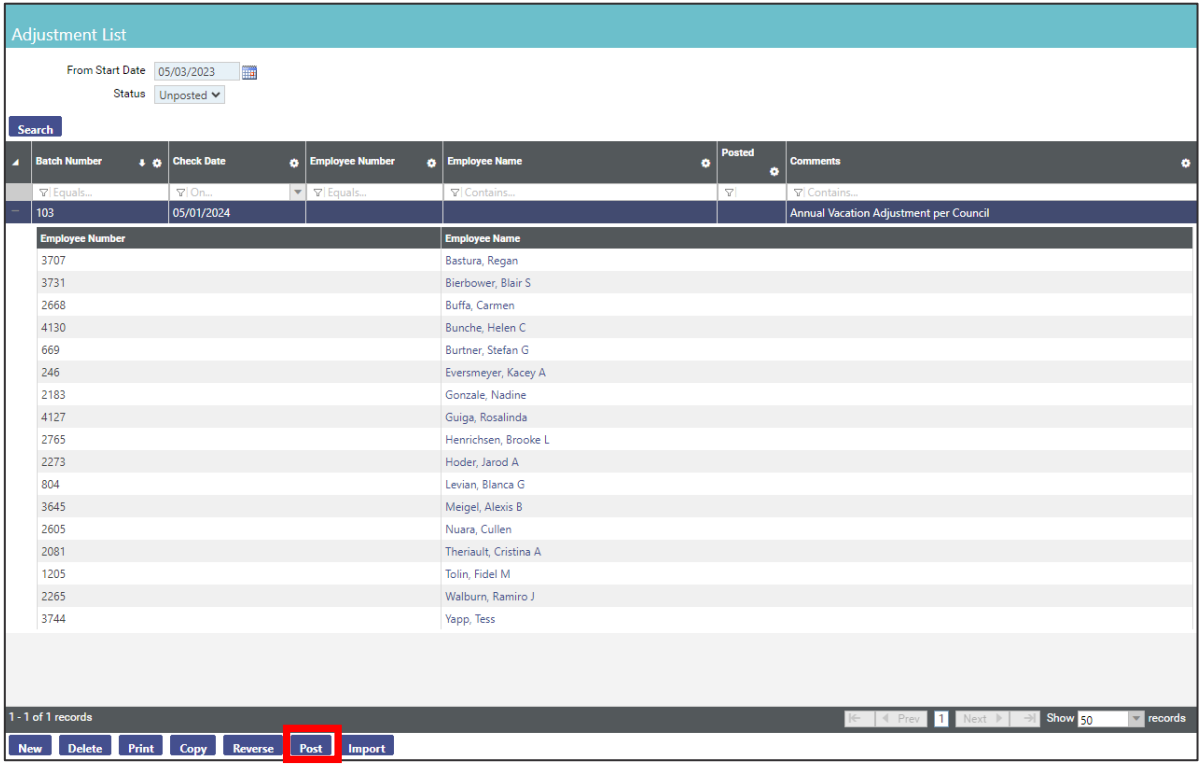
Adjustment Import

Human Resources > Payroll Administrator Tasks > Adjustment Processing



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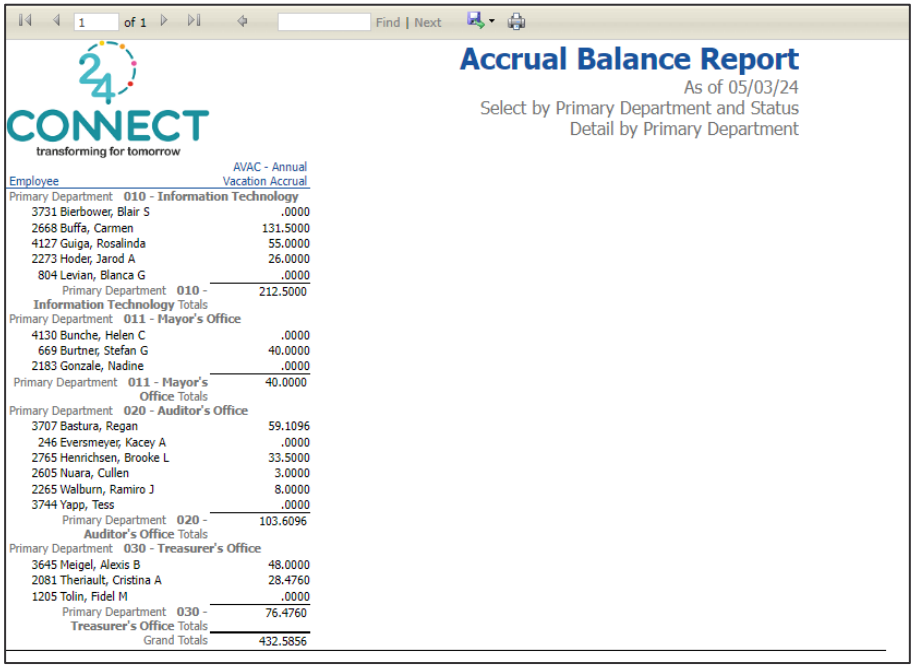
Accrual Balance Report
Before and After Comparison

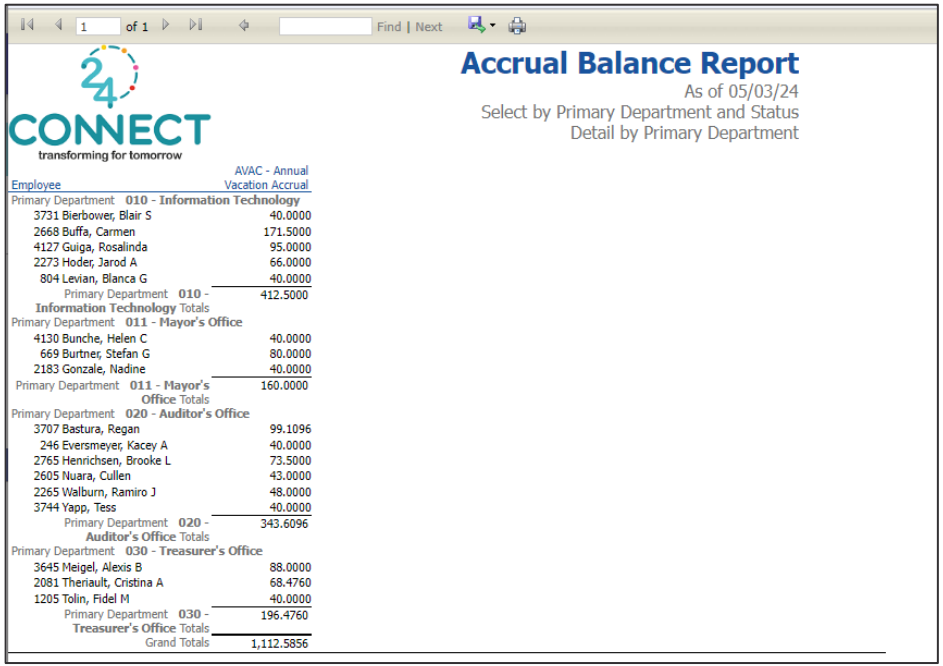


1 of 1 Find | Next

CONNECT 24
transforming for tomorrow

Accrual Balance Report
As of 05/03/24
Select by Primary Department and Status
Detail by Primary Department

Employee	AVAC - Annual Vacation Accrual
Primary Department 010 - Information Technology	
3731 Bierbower, Blair S	.0000
2668 Buffa, Carmen	131.5000
4127 Guiga, Rosalinda	55.0000
2273 Hoder, Jarod A	26.0000
804 Levian, Blanca G	.0000
Primary Department 010 - Information Technology Totals	212.5000
Primary Department 011 - Mayor's Office	
4130 Bunche, Helen C	.0000
669 Burtner, Stefan G	40.0000
2183 Gonzale, Nadine	.0000
Primary Department 011 - Mayor's Office Totals	40.0000
Primary Department 020 - Auditor's Office	
3707 Bastura, Regan	59.1096
246 Eversmeyer, Kacey A	.0000
2765 Henrichsen, Brooke L	33.5000
2605 Nuara, Cullen	3.0000
2265 Walburn, Ramiro J	8.0000
3744 Yapp, Tess	.0000
Primary Department 020 - Auditor's Office Totals	103.6096
Primary Department 030 - Treasurer's Office	
3645 Meigel, Alexis B	48.0000
2081 Theriault, Cristina A	28.4760
1205 Tolin, Fidel M	.0000
Primary Department 030 - Treasurer's Office Totals	76.4760
Grand Totals	432.5856



1 of 1 Find | Next

CONNECT 24
transforming for tomorrow

Accrual Balance Report
As of 05/03/24
Select by Primary Department and Status
Detail by Primary Department

Employee	AVAC - Annual Vacation Accrual
Primary Department 010 - Information Technology	
3731 Bierbower, Blair S	40.0000
2668 Buffa, Carmen	171.5000
4127 Guiga, Rosalinda	95.0000
2273 Hoder, Jarod A	66.0000
804 Levian, Blanca G	40.0000
Primary Department 010 - Information Technology Totals	412.5000
Primary Department 011 - Mayor's Office	
4130 Bunche, Helen C	40.0000
669 Burtner, Stefan G	80.0000
2183 Gonzale, Nadine	40.0000
Primary Department 011 - Mayor's Office Totals	160.0000
Primary Department 020 - Auditor's Office	
3707 Bastura, Regan	99.1096
246 Eversmeyer, Kacey A	40.0000
2765 Henrichsen, Brooke L	73.5000
2605 Nuara, Cullen	43.0000
2265 Walburn, Ramiro J	48.0000
3744 Yapp, Tess	40.0000
Primary Department 020 - Auditor's Office Totals	343.6096
Primary Department 030 - Treasurer's Office	
3645 Meigel, Alexis B	88.0000
2081 Theriault, Cristina A	68.4760
1205 Tolin, Fidel M	40.0000
Primary Department 030 - Treasurer's Office Totals	196.4760
Grand Totals	1,112.5856

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Third Party Hours Import

- Your organization must license the Time & Attendance Interface
- Imports hours into an open payroll batch
- Can be used for any hours code
- Examples
  - Lump sum payments that can't be scheduled (safety incentives)
  - Bonuses
  - Imputed Income adjustments
  - Car allowances
  - Hours exported from non-integrated time keeping software

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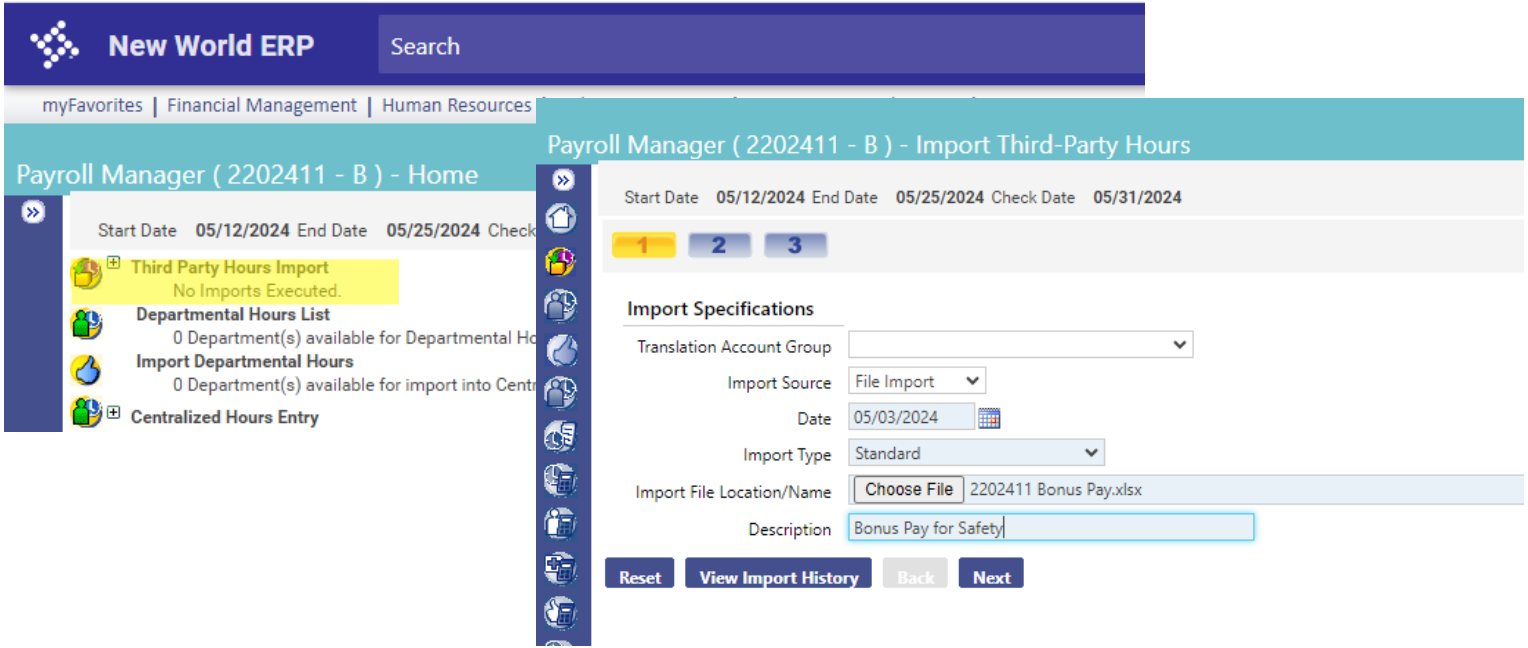
Third Party Hours Import

Usually Accessed Through Payroll Manager



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Third Party Hours Import

- Employee Number
- *Hours Worked*
- Hours Codes
- Work Date
- *Other Pay Amount*
- Separate Check Code
- Override Pay Rate
- Shift Code
- Override G/L Organization
- Reason Code
- Project Code
- Override Grade Code
- Override Step Code
- Override Department
- Comments
- Override Job Title
- Override Position

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I’m Never Going to Remember All This!

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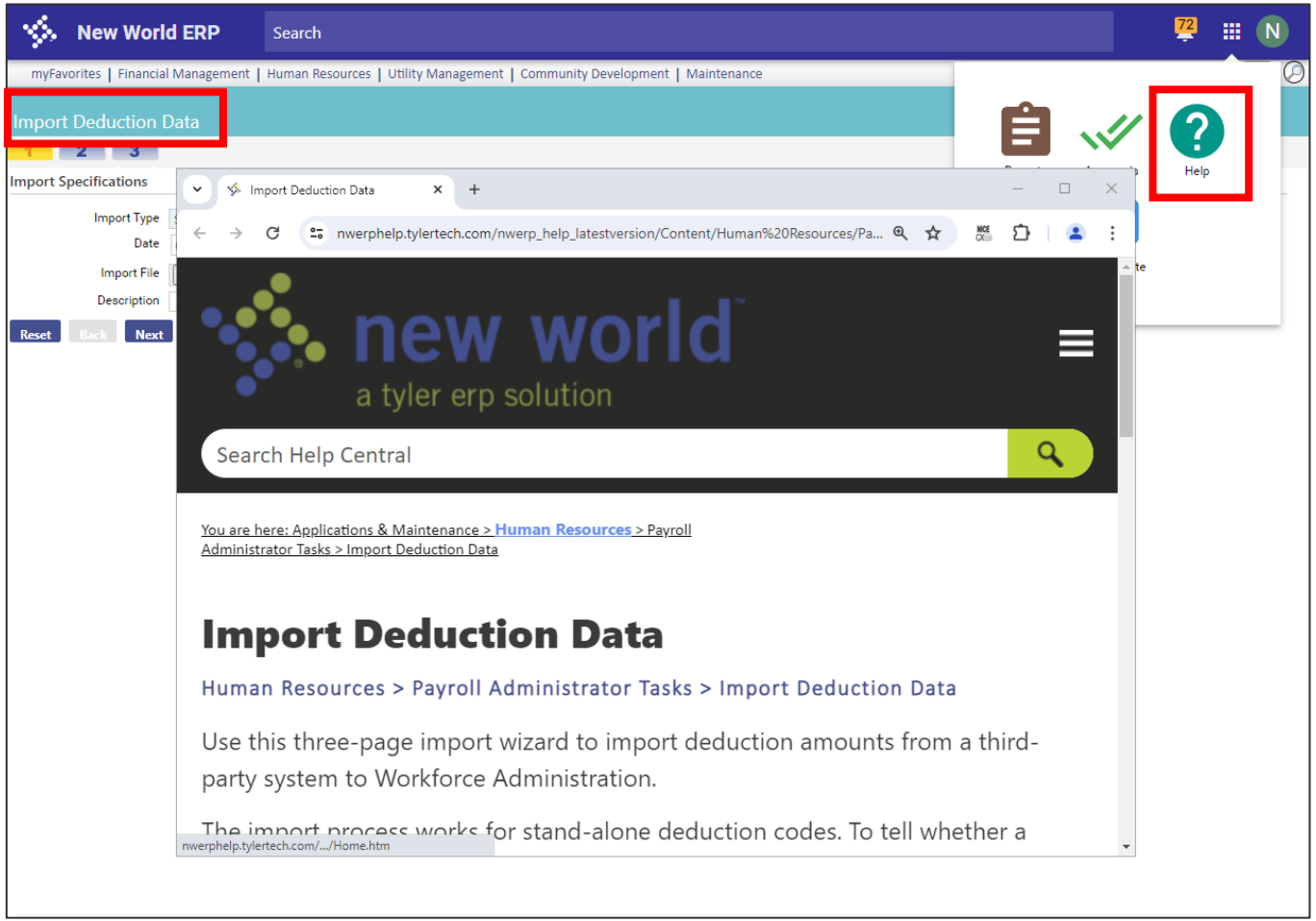

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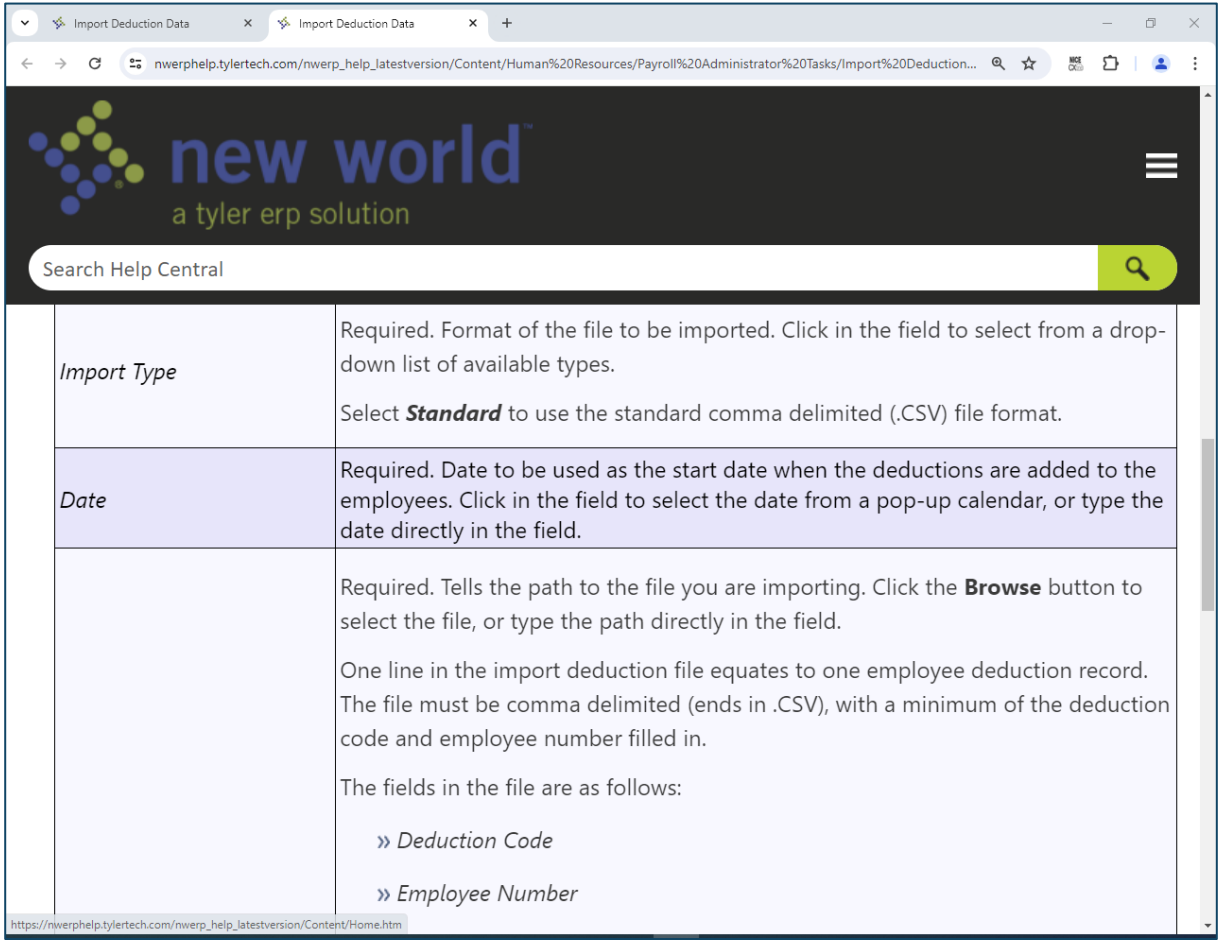

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Calculation Processes

Human Resources > Payroll Administrator Tasks

- Calculate Step Rate Increase

- Calculate Mass Rate Increase

- Process Retro Pay

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Calculation Processes

A. Calculate Step Rate Increases – used to move employees up a Step
    1. Can be run by Anniversary or Effective Date
    2. Must be run **before** Calculate Mass Rate Increase

B. Calculate Mass Rate Increase – used to increase Grade Rates and employee rates simultaneously
    1. Can be run by Grade Type
    2. Can increase by Amount or Percent
    3. Updates Grade and Employees as of an Effective Date

C. Process Retro Pay – used to pay employees retroactively
    1. Update employee Job prior to calculation
    2. Can be run by Department or Employee
    3. Can limit hours codes that receive Retro
    4. Cannot be used for employees with a Salary Grade

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“My goal is no longer to get more done, but rather to have less to do.” — Francine Jay

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