

Common Employee Changes



Dave Yost • Auditor of State

Uniform Accounting Network – Common Employee Changes

COMMON EMPLOYEE CHANGES

When periodic changes are needed to employees' payroll settings, most often it will be necessary to enter edits under **Payroll** → **Maintenance** → **Employees**. Whether you are a newly hired or appointed fiscal officer or simply have not needed to make employee setup changes in a long time, getting comfortable with navigating and understanding the employee maintenance forms and sub-forms is worth the effort to ensure you get the most out of the payroll module when changes become necessary.

EMPLOYEE MAINTENANCE SCREEN NAVIGATION



Steps to access: Payroll → **Maintenance** → **Employees**

Using the Display button to browse will ensure that you do not save an unintended change by mistake. Simply checkmark an Employee ID from the Employee list and click Display to open the Display Employee form. Each tab page on the form that includes an item list will also have a Display button to view the details of the selected items.

When you are ready to edit, close the display forms and return to the Employee list. Checkmark one employee and click Edit. When you select Edit you must choose between two edit types: Guided and Advanced.

- 1) Guided requires you to select Edit an Existing Item or Attach a new item and then you must select the item you want to edit or add. Only use Guided when you need to take one action. Guided takes you to the one tab you have indicated but won't allow you to see any other part of the employee record – this option is not helpful when reviewing or reorganizing employee setup.
- 2) Advanced allows you complete access to the employee record. This option is recommended for most employee setup changes.

Navigation of the Edit Employee form is made easier with the icons you will see in the upper right corner of the forms. The **Edit Employee** form includes an icon to identify it from its sub-forms:

 OR  = Edit Employee form

The Edit Employee form includes these tabbed pages:

INFORMATION

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The employee's basic information, such as name, address, retirement member dates, base hours and tax deductions are included on this page.

ADDITIONAL INFO

On this page you can attach customized information. Items marked "sensitive" in Payroll → Maintenance → Additional Information will appear with encrypted data and access will be restricted to users that have security clearance. For more information on user security clearance click General → Maintenance → Users and click [Need Help?].

The remaining tabbed pages include item lists with Add, Edit, Activate, Deactivate, Remove and Display buttons that can take action on the list or open sub-forms. Each sub-form has a special icon to make it easier to navigate:

EARNINGS

An Earning is the primary type of cash compensation for an employee. One or more earnings can be assigned to an employee. Other types of compensation such as overtime, leave, non-cash benefits are located and edited on other tabs.

OVERTIME

Overtime compensation is listed on this form. To edit the attachment to an earning you must edit the overtime. An overtime can be assigned to only one earning, but an employee earning can have multiple overtimes. For example, a single Hourly earning might have 1½ overtime and double-time assigned to it.

NON-CASH

No cash benefits are contained on this tab. Each non-cash benefit must be assigned to only one earning, but an earning can have more than one non-cash benefit assigned to it.

LEAVES

Leaves are managed from this tab. Leave attachments for earnings should be edited from the Leaves form. The 'WH' earning can only be edited from the leaves form.

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WITHHOLDINGS

Withholdings listed on the Withholding tab do not indicate attachments to earnings. Viewing this list shows only the withholdings that are available to be attached to the earnings. You must edit the withholding to change the rate or amount of the withholding and to edit the employer share accounts for Medicare and/or retirement withholdings. A withholding can be assigned to multiple earnings. Withholding attachments to earnings can be viewed and edited in the Edit Withholding form on the Earning tab or in the Edit Earning form on the Withholding tab.

PAY RATE CHANGE

Our full-time employee with leave has received a \$0.50 raise in pay.

Steps to access: Payroll → Maintenance → Employees

Select: Friendly, S

Click: Edit and Advanced

Click: The Earnings Tab

Select: 2000 Hourly Wages

Click: Edit and the Edit Employee Earning form opens 

Type: \$15.50 over the existing \$15.00 in the Pay rate box. Steve has received a 50 cent per hour raise in pay for all of his earnings, leave and overtime base pay.

Click: Save.

You receive a system message asking: “Should UAN automatically change all other items with the prior rate to the new rate for this employee?”.

Click: Yes.

You receive a system message confirming that Pay rates of \$15.00 for this employee have been updated to \$15.50.

Click: OK to close message

Click: Close to return to the Edit Employee form and Close to return to the Employees form.

ADD AN ACCOUNT TO AN EXISTING EARNING

Add an appropriation account to an existing earning that already had multiple accounts and object split method for Employer Share of Medicare and OPERS.

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Steps to access: Payroll → Maintenance → Employees

Select: Crank, C

Click: Edit and Advanced

Select: The Earnings Tab

Select: 2000 Hourly Wages

Click: Edit and the Edit Employee Earning form opens 

Click: On the Accounts tab.

Click: On the data entry drop down arrow and select 2041-410-190-0000

Click: On the ↑ to insert the new account in the appropriation accounts box

Review: The Account Split Method for accuracy

Click: On the Withholdings tab to review the accounts in the Employer/Fringe column for Medicare and Retirement. If settings are correct,

Click: Save and Close to return to the Edit Employee form, remain on this form for the next exercise.

In this situation you may want to add the same account to overtime and leave. Go to each tab, select the item and click Edit, on the edit form click on the accounts tab and add the new account. Save and Close then go to the next item and/or tab.

DEMONSTRATION, ADD EARNING ACCOUNT, CHANGE THE SPLIT METHOD AND UPDATE THE EMPLOYER SHARE WITHHOLDINGS BY EDITING THE WITHHOLDINGS

The instructor will demonstrate adding an account to an earning for an employee that only had one account. The withholdings for Medicare and retirement must also be edited to select an employer share split method to accommodate the new account added to the earning.

- 1) **Edit existing earning:** **Steps to access:** Payroll → Maintenance → Employees. Mark the employee and click Edit – Advanced to open the Edit Employee form. Click on the Earnings tab. In our sample, the original earning had one account and was set to no-split. The earning is edited and on the accounts tab, a new account is added to the list and a split method is selected. Save and Close to return to the Edit Employee Form and remain in the Edit Employee form for step 2. In this situation you may want to add the same account to overtime and leave. Go to each tab, select the item and click Edit, on the edit form click on the accounts tab and add the new account and select the split method. Save and Close then go to the next item and/or tab. You may want to edit the Overtime and Leaves to add the new account and split method.
- 2) **Edit withholdings that have an employer share:** In our example the employer share of Medicare and OPERS was originally set to no-split with one account because the employee

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only had one earning. Now that they are paid from two different accounts we want the employer share of Medicare and OPERS to be paid proportionately as the earnings are paid. Click on the Withholdings tab. Select Medicare and OPERS and click Edit. Change the split method on the Appropriation Accounts (Employer Share) tab and the Appropriation Accounts (Fringe Benefit) tab to Object split and select the object number from the drop down list. In your employee the retirement may be OP&FPF or Social Security instead of OPERS. Verify all withholdings with employer share appropriation account settings are updated.

DEMONSTRATION: ADD NON-PENSIONABLE LEAVE PAYOUT EARNINGS

The Payout of unused leave at retirement, termination of employment or during the course of the year when your policies state unused leave can be paid out may or may not be pensionable. You must verify the pensionable or non-pensionable status of the payout with OPERS and OP&FPF prior to payment.

If the item is non-pensionable the correct method of payment is to set up a Non-Pensionable Earning so the employer and employee share of the retirement won't be generated on the earning or included on the monthly retirement report.

The instructor will demonstrate the payout of unused vacation and a portion of sick leave at retirement of Barry D. Ceased. Keep in mind we are using fabricated polices to illustrate a point. You must use your locally adopted legislation and policies to determine the amount of payout your employees' may be entitled to at retirement or termination. Our fake policy grants the payout of 100% of the vacation leave balance but a maximum of 80 hours of unused sick leave upon retirement.

- 1) **Adjust leave balances:** The first step is to adjust out the leave balance that will be paid out. When a leave balance is paid as a non-pensionable earning the balance must be reduced using the Leave balance Adjustment Utility. **Steps to access: Payroll → Utilities → Leave Balance Adjustment.** Select the employee from the drop down list and enter a negative adjustment for the hours to be paid. Type a purpose in the box to document the reason for the adjustment. Also, if upon retirement or termination there are leave balances that will be unpaid according to your policies, the remaining leave balances should be adjusted to zero as a separate adjustment.
- 2) **Edit existing earning:** **Steps to access: Payroll → Maintenance → Earnings & Leave.** If you have not set up a non-retirement item in the software you see the original default for Non-Retirement Item (Type #9000) that can be edited and used for the first earning. Select Non-Retirement from the list and click Edit, change the default name to the specific name you need such as Vacation Leave Payout. Click Save & Close. If you are paying out more than one type of leave it is recommended you have specific earnings set up for each type, continue with step 3.

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- 3) **Add a new earning:** If the original Non-Retirement item (Type #9000) has already been re-named and is in use click Add and the Add Earning or Leave form opens. Type the name, such as Sick Leave Payout and for the type select Non-Retirement Item. The software assigns the next available number. Click Save & Close.
- 4) **Add Earning(s) to Employee:** **Steps to access:** Payroll → Maintenance → Employees
Mark the employee and click Edit – Advanced to open the Edit Employee form.
 - a. On the Earnings tab: Click Add and add the new leave payout earnings. You must click on the Withholdings tab in the Add Employee Earning form to attach the withholdings to the earning. Do not attach items such as insurance or OPERS/OP&FPF. You must also click on the accounts tab to indicate which appropriation account will pay the earning. Save.
 - b. Close or repeat the process for multiple payout earnings.

DEMONSTRATION ADD NON-CASH BENEFIT TO AN EMPLOYEE

- 1) **Edit Existing Non-Cash Earning to be the new Non-Cash Benefit “Taxable Commute”:** *(If you’ve already used the default non-cash benefit click the Add button and set up a new earning under the Type: Non-Cash Benefit)* **Steps to access:** Payroll → Maintenance → Earnings and Leave
- 2) **Add the Non-Cash Benefits to Employee:** **Steps to access:** Payroll → Maintenance → Employees. Mark the employee and click Edit – Advanced to open the Edit Employee form.
 - c. On the Non-Cash tab: Click Add and add the new non-cash item. You must click on the Earnings tab to attach the Non-Cash item to the earning. Save and Close.

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DEMONSTRATION: ADD EXISTING WITHHOLDING TO AN EMPLOYEE

Our employee Carl Crank has submitted a new W-4 form that requests an additional \$40 be withheld for Federal Tax from each paycheck. We add Supplemental Federal Withholding to the employee and attach the new withholding to the earning.

Steps to access: Payroll → Maintenance → Employees

Select: Crank, C

Click: Edit and Advanced

Click: The Withholdings Tab

Click: Add and the Add Employee Withholding form opens

Click: The drop arrow for withholding and select Supp. Federal Withholding from the list.

Click: On the radio button next to Amount and enter \$40.00 in the box.

Click: On the Earnings tab and click in the box 2000 Hourly Wages (attach to earning)

Click: Save and Close to return to the Edit Employee form.

Click: Close to return to the Employees form.

DEMONSTRATION: EMPLOYEE ADDRESS CHANGE REQUIRES NEW SCHOOL TAX WITHHOLDING

When an employee informs you of an address change you need to update their address in the software.

Steps to access: Payroll → Maintenance → Employees.

Mark the employee and click Edit – Advanced to open the Edit Employee form. On the Information tab update the employee address and click Save. Changes in withholdings may be required when an employee moves. The new address may require you to deactivate local and/or school taxes associated with their old address and add new local and school taxes required for their new address. It is important to identify any changes and update the Employees' setup before the next payroll.

If a new withholding with a new vendor/payee is required, then first add the vendor/payee:

Steps to access: General → Maintenance → Vendors/Payees

Click: Add to open the Add Vendor/Payee form. Type the name of the new vendor/payee and the tax identification number in account 1, mark it to be available for Payroll Withholdings and click Save. To add a location address click Add, give the location a description and type in the address for the payment. Save and Close then Save and Close the Add vendor/payee form.

In our example the Ohio School District Income Tax vendor/payee already exists but the new North School District Tax withholding must be created.

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Add a new withholding:

Steps to access: Payroll → Maintenance → Withholdings and click [Add] to open the Add Withholdings form. Type a name for the withholding (once the withholding is used you will not be able to edit the name), select the correct process group from the drop down list. Select the Payee from the drop down list and complete the details for the withholding.

Attach the new withholding to an employee:

Steps to access: Payroll → Maintenance → Employees Mark the employee and click Edit – Advanced. Click on the Withholdings Tab and Click Add. Select the new withholding from the drop down list, our example is the North School Tax, and verify the withholding rate or amount. Click on the Earnings tab and notice that with school taxes all earnings are automatically selected. Other withholdings require you to select the earnings to create the attachments before saving the new withholding. Save and Close – stay on the Edit Employee form on the Withholdings tab.

Deactivate the school tax associated with the employee's old address:

Steps to access: Payroll → Maintenance → Employees Mark the employee and click Edit – Advanced. Click on the Withholdings Tab. Select the school tax associated with the employee's old address and click Deactivate.

DEMONSTRATION: WITHHOLDING RATE CHANGE FOR ALL EMPLOYEES

The Withholdings Editor enables the employee withholdings to be updated for multiple employees using one form. First you must update the withholding to the new rate.

Steps to access: Payroll → Maintenance → Withholdings

Select the Withholding and edit the withholding amount or rate. Save and Close

Next update all employees that have this withholding by using the Withholdings Editor

Steps to access: Payroll → Maintenance → Withholdings Editor

Choose the withholding from the drop down list. Select the employees affected by the new rate or amount. Enter the new rate or amount in the boxes at the bottom. Clicking save will update all selected employees to the new rate or amount.

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TROUBLESHOOTING

I can't create a wage for an employee: If you have added a new employee or added a new earning to an existing employee you may be getting the message an active Medicare and/or a Retirement withholding isn't attached to the earning. You have skipped the step attaching withholdings to the earning.

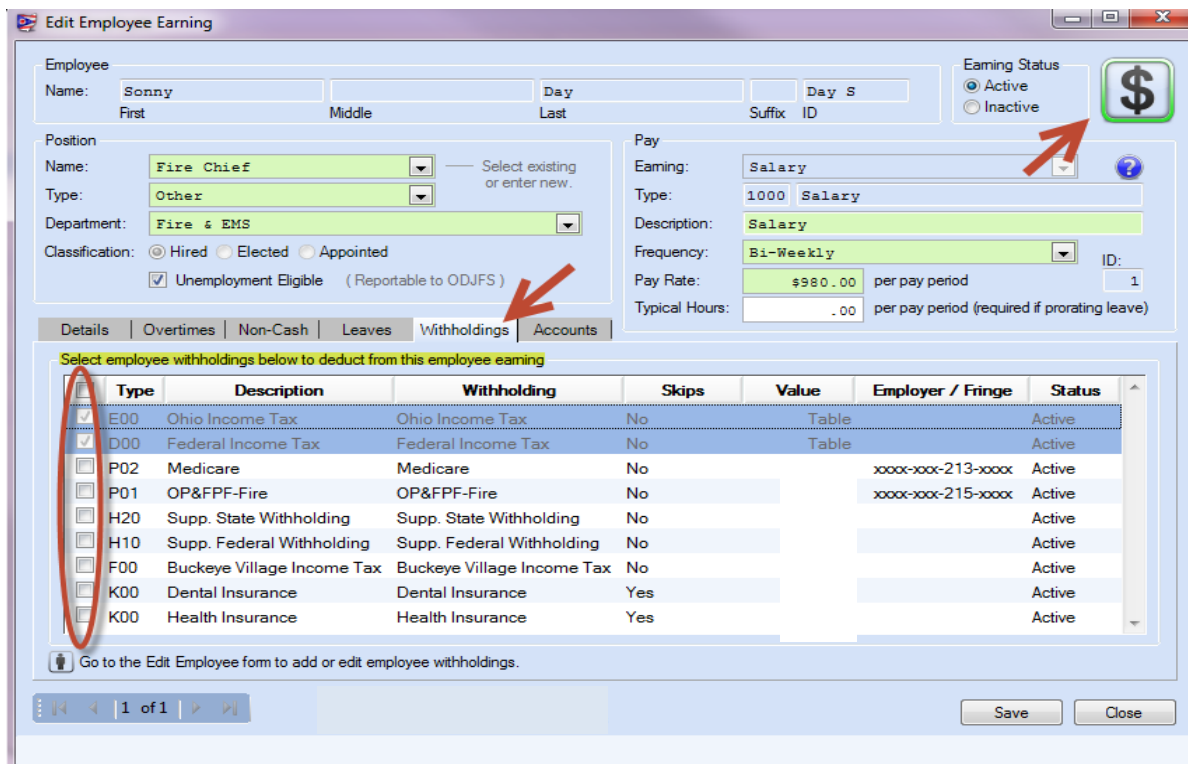
Steps to access: Payroll → Maintenance → Employees

Select: The Employee from the list.

Click: Edit and Advanced.

Click: On the Earnings Tab and select the earning(s) and click Edit. In the Edit Employee Earning  form click on the Withholdings Tab.

See below how the withholdings are listed but they have not been selected. The software won't allow you to create a wage without Medicare and a retirement attachment to the earning.



Employee Name: Sonny (First, Middle, Last), Day S, Suffix, ID

Earning Status: Active, Inactive

Position Name: Fire Chief, Type: Other, Department: Fire & EMS, Classification: Hired, Elected, Appointed, Unemployment Eligible (Reportable to ODJFS)

Pay Earning: Salary, Type: 1000 Salary, Description: Salary, Frequency: Bi-Weekly, Pay Rate: \$980.00 per pay period, Typical Hours: .00 per pay period (required if prorating leave)

Details | Overtimes | Non-Cash | Leaves | **Withholdings** | Accounts

Select employee withholdings below to deduct from this employee earning

Type	Description	Withholding	Skips	Value	Employer / Fringe	Status
<input checked="" type="checkbox"/>	E00 Ohio Income Tax	Ohio Income Tax	No	Table		Active
<input checked="" type="checkbox"/>	D00 Federal Income Tax	Federal Income Tax	No	Table		Active
<input type="checkbox"/>	P02 Medicare	Medicare	No		xxxx-xxx-213-xxxx	Active
<input type="checkbox"/>	P01 OP&FPF-Fire	OP&FPF-Fire	No		xxxx-xxx-215-xxxx	Active
<input type="checkbox"/>	H20 Supp. State Withholding	Supp. State Withholding	No			Active
<input type="checkbox"/>	H10 Supp. Federal Withholding	Supp. Federal Withholding	No			Active
<input type="checkbox"/>	F00 Buckeye Village Income Tax	Buckeye Village Income Tax	No			Active
<input type="checkbox"/>	K00 Dental Insurance	Dental Insurance	Yes			Active
<input type="checkbox"/>	K00 Health Insurance	Health Insurance	Yes			Active

Go to the Edit Employee form to add or edit employee withholdings.

1 of 1 Save Close

Click in the boxes to attach the withholdings to the earnings. Click Save & Close. Repeat this edit for all earnings listed. See next page for a picture of what it will look like when you have made the attachments.

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See below how the screen will look when withholding attachments have been made

Edit Employee Earning

Employee Name: Sonny (First), Day S (Day 5)

Position Name: Fire Chief, Type: Other, Department: Fire & EMS

Classification: Hired, Elected, Appointed, Unemployment Eligible (Reportable to ODJFS)

Earning Status: Active, Inactive

Pay Earning: Salary, Type: 1000 Salary, Description: Salary, Frequency: Bi-Weekly, Pay Rate: \$980.00 per pay period, Typical Hours: .00 per pay period (required if prorating leave)

Details | Overtimes | Non-Cash | Leaves | **Withholdings** | Accounts

Select employee withholdings below to deduct from this employee earning

Type	Description	Withholding	Skips	Value	Employer / Fringe	Status
<input checked="" type="checkbox"/>	E00 Ohio Income Tax	Ohio Income Tax	No	Table		Active
<input checked="" type="checkbox"/>	D00 Federal Income Tax	Federal Income Tax	No	Table		Active
<input checked="" type="checkbox"/>	P02 Medicare	Medicare	No		xxxx-xxx-213-xxxx	Active
<input checked="" type="checkbox"/>	P01 OP&FPF-Fire	OP&FPF-Fire	No		xxxx-xxx-215-xxxx	Active
<input checked="" type="checkbox"/>	H20 Supp. State Withholding	Supp. State Withholding	No			Active
<input checked="" type="checkbox"/>	H10 Supp. Federal Withholding	Supp. Federal Withholding	No			Active
<input checked="" type="checkbox"/>	F00 Buckeye Village Income Tax	Buckeye Village Income Tax	No			Active
<input checked="" type="checkbox"/>	K00 Dental Insurance	Dental Insurance	Yes			Active
<input checked="" type="checkbox"/>	K00 Health Insurance	Health Insurance	Yes			Active

Go to the Edit Employee form to add or edit employee withholdings.

1 of 1


Save Close

I added Leave to an employee but it isn't appearing on his wages: You probably haven't attached the leave to any active earnings and/or assigned a WH earning.

Steps to access: Payroll → Maintenance → Employees

Select: The Employee from the list.

Click: Edit and Advanced.

Click: On the Leaves Tab select the leaves and click Edit. In the Edit Employee Leave  form click on the Earnings Tab.

See the next page for a picture of leave incorrectly set up without the attachment to earnings or a WH earning.

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Notice on the Edit Employee Leave form, on the Earnings tab, no attachments have been made to the earning. This leave will not appear on the wage for payment until the attachments and WH selection are made. Both attachments are required.

The screenshot shows the 'Edit Employee Leave' form with the following details:

- Employee:** Name: Sonny (First, Middle, Last), Day S, Suffix, ID.
- Leave Status:** Active, Inactive.
- Leave:** Leave: Vacation Leave, Type: 5004 Leave and Comp Time, ID: 3, Description: Vacation Leave.
- Pay:** Leave is: Paid when used, Not paid when used (salaried), Pay Rate: \$.00 per hour.
- Earnings Tab:** Select hourly or salary employee earnings below that, when paid, may accrue or use/pay this employee leave (withholdings will inherit from selected "WH" earning).
- Earnings Table:**

WH	Type	Description	Frequency	Position	Pay Rate	Account	Status
<input type="checkbox"/>	<input type="radio"/>	1000 Salary	Bi-Weekly	Fire Chief	\$980.00	2191-220-190-0000	Active

At the bottom of the form, there is a 'Go to the Edit Employee form to add or edit employee earnings.' link, a '1 of 1' indicator, and 'Save' and 'Close' buttons.

Click in the boxes to attach the leave to the earning(s). A leave may be attached to one or more earnings depending upon your payroll set-up and policies. You **must** also select only one earning as the WH earning by clicking in the radio button next to the earning. Once you make your selections click Save then Close. Repeat this edit for all leaves.

See the next page for a picture of correctly attached leaves.

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See below how the screen will look once your attachments are made.

Edit Employee Leave

Employee Name: Sonny (First), Day (Day 5)

Leave: Vacation Leave (Type: 5004 Leave and Comp Time, Description: Vacation Leave)

Pay: Not paid when used (salaried), Pay Rate: \$. 00 per hour

Leave Status: Active, Inactive

Details | **Earnings** | Withholdings | Appropriation Accounts

Select hourly or salary employee earnings below that, when paid, may accrue or use/pay this employee leave (withholdings will inherit from selected "WH" earning)

<input checked="" type="checkbox"/>	WH	Type	Description	Frequency	Position	Pay Rate	Account	Status
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	1000	Salary	Bi-Weekly	Fire Chief	\$1,480.00	2191-220-190-0000	Active

Go to the Edit Employee form to add or edit employee earnings.

1 of 1 | Save | Close

I want Leave balances to print on the pay stubs: When you select wages to Post/Print, on the Next Warrant Number Form you have selections you can make to add information such as leave balances, appropriation accounts and the employee address on the warrant/voucher. Click to place a check in the box for the item as you see below.

Next Warrant Number

Wages: Post Date: (EFT Deposit / Warrant Issue Date), Stub Note: (optional)

Wage Printing: Warrant: Employee address, Pay stub: Employee leave balances, Pay stub: Salary account distribution, EFT: Plain Paper, EFT Forms

Warrants: Next Warrant #: 2841, User Selected #: 2841, Warrants Skipped: 0

OK | Cancel


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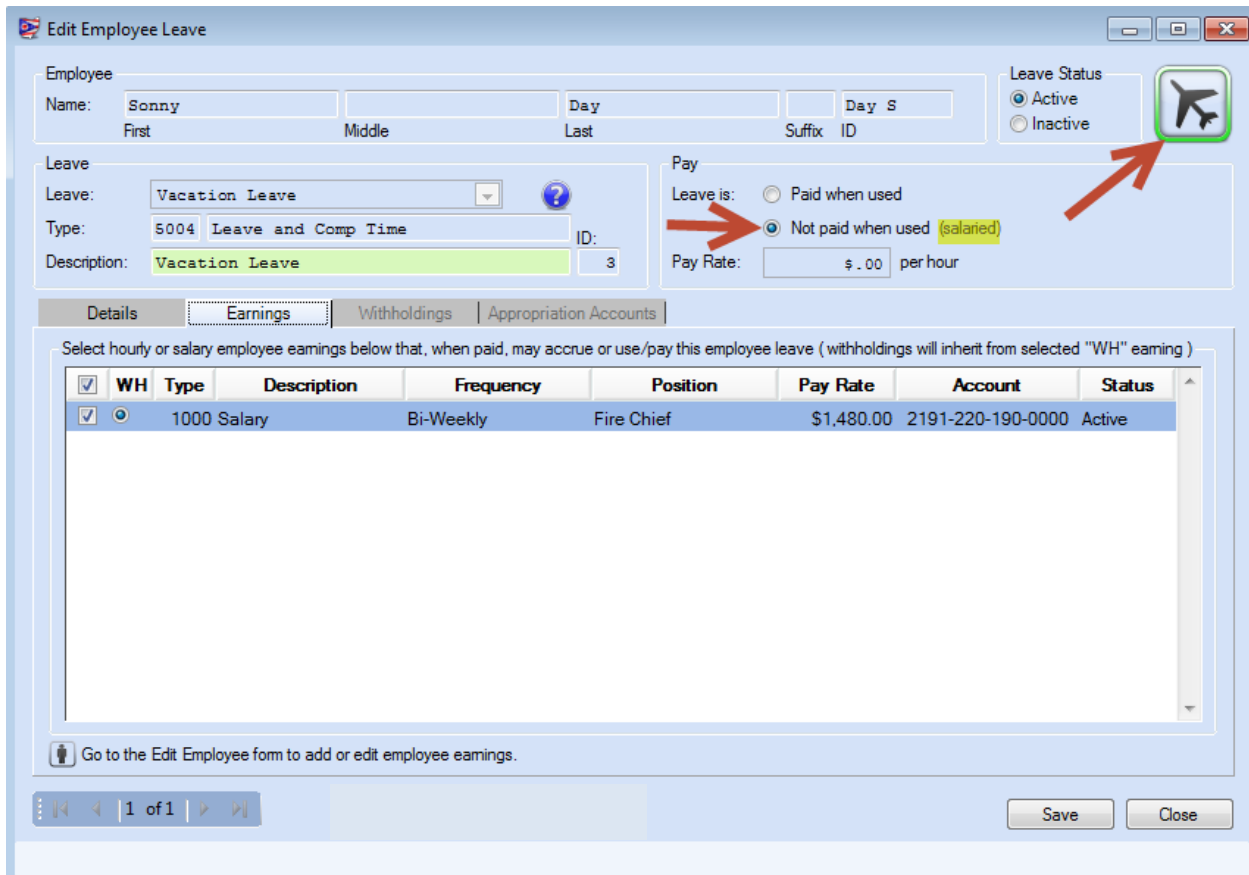
When I enter hours in a Salaried employee's vacation leave the software is adding to his paycheck. You have added the leave with an incorrect setting.

Steps to access: Payroll → Maintenance → Employees

Select: The Employee from the list.

Click: Edit and Advanced.

Click: On the Leaves Tab and select the leaves to edit. On the Edit Employee Leaves  form, in the Pay section there are settings for Paid when used (for hourly employees) and Not paid when used (for salaried employees). Select the correct setting, Save & Close.



Edit Employee Leave

Employee Name: Sonny (First), Day (Last), Day S (ID), Suffix (ID)

Leave: Vacation Leave (Type: 5004 Leave and Comp Time, ID: 3, Description: Vacation Leave)

Pay: Leave is: Paid when used, Not paid when used (salaried), Pay Rate: \$.00 per hour

Leave Status: Active, Inactive

Details | Earnings | Withholdings | Appropriation Accounts

Select hourly or salary employee earnings below that, when paid, may accrue or use/pay this employee leave (withholdings will inherit from selected "WH" earning)

WH	Type	Description	Frequency	Position	Pay Rate	Account	Status
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	1000 Salary	Bi-Weekly	Fire Chief	\$1,480.00	2191-220-190-0000	Active

Go to the Edit Employee form to add or edit employee earnings.

1 of 1 | Save | Close

You would have to delete the wage in the batch and add a new wage for the change to appear on the wage. The hours of used leave for a salaried employee will be entered in the lower box for Earned/Used/Denied leaves.

I can't pay a new employee; appropriation accounts don't exist: This message typically appears when an employee earning is paid from multiple accounts and you want the employer share of Medicare, Social Security, and OPERS/OP&FPF to be paid from the same funds in

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proportion to the earning accounts; the object split method is chosen for the employer share. Your appropriation accounts and budgets must include the same fund, program and cost center numbers for the employer share of Medicare and retirement withholdings for object split to work.

My Earnings are
paid from:
1000-110-190-0000
2021-330-190-0000

I must have budgeted
Medicare accounts at:
1000-110-213-0000
2021-330-213-0000

If this detail doesn't already exist in your appropriation budget, it is recommended that you add the new appropriation accounts and reallocate the appropriation budgets so they do exist.

UAN staff has seen this error when cost centers are unnecessarily used in the software to separate wages for different types of employees. We don't recommend the use of cost centers except in extraordinary circumstances such as when different library branches or township fire stations or contracts require a separation in revenue or expenditures for the existing Auditor of State accounts. If you are making the separation in the wages by the use of cost centers then you should make the same separation in the employer share withholding accounts such as Medicare/Social Security/OPERS/OP&FPF, then the object split method will work. The alternative is to select a different split method for the employer share of the withholdings.