Missouri PSR Career Ladder

Set Up a Payee for the PSR Career Ladder Deduction:

Note: The payee for the PSR Career Ladder deduction will be identical to the one used for your certified teachers retirement deduction but with a different Payee ID.

PSRCL

- 1. From the Payroll screen, select the **Maintenance** menu and then **Payees**.
- 2. Bring up the certified teachers File Options Reports Pin To Help retirement payee by entering the ID in General Miscellaneous Payee ID the Payee ID field, or click the downarrow button or the Find button to select the correct one.
- 3. Key a new ID in the Payee ID field that will easily identify the payee for the PSR Career Ladder deduction.
- 4. Enter a description of this payee in the Comments field so you can distinguish it from the regular PSR payee. See **Diagram A**.
- 5. Click the Save button.
- 6. When prompted to change the Payee ID, click the Create New button to create the new PSR Career Ladder payee. See Diagram B.

Tip: To set up the payee to print an autor during the check cycle rather than a check

Miscellaneous tab and select the Automa

Set Up the PSR Career Ladder Deduction

- 1. From the Payroll screen, select the Ma Deductions.
- 2. Bring up the certified teachers retireme field, or click the **down-arrow** button or the **Find** button to select the correct one.
- 3. Key a new ID in the Deduction ID field that will easily identify the PSR Career Ladder deduction.
- 4. Click the Save button.
- 5. When prompted to change the Deduction ID, click the Create New button to create the new PSR Career Ladder deduction. See **Diagram C**.
- 6. In the Deduction Description field, enter a longer description for the PSR Career Ladder deduction.
- 7. In the Deduction Check Description field for the PSR Career Ladder deduction, enter a description for the deduction that will print on the employee's check stub.
- 8. Change the Pavee ID field to reflect the pavee that was set up in the previous section (above) for the PSR Career Ladder deduction.
- 9. Unselect the State Retirement System Deduction field so that a checkmark does not appear.

Diagram A

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Active Entty Roles Payee

- In the Cross References List for the PSR Career Ladder deduction, select 10. Unselect the File Options Report the certified teachers retirement deduction, leave the appropriate taxes and **Retirement Plan (Box** General Rate Table the non-certified retirement deduction selected, and unselect all pay codes. General Info 13) field in the W2 Active Deduction ID PSRCL ID Type V Δ7 Description Information section so Deduction Descr PSR Career Ladder Personal Leave Add Payment-In-Kind Payment In Kind Deduction Type Deduction PIK that a checkmark does Deduction Check Description PSR CL PRO Professional Leave Add School ID Number REG Regular Rate Δdd not appear. Payables Mask XX 2158 SEC Secretary Add SICK Sick Leave Add Expense Mask XX XXXX 6211 XXXX X XXXXX 11. In the Cross TICK Tickets Add 900 Deduction Sequence Vacation Leave Percent Table Declining VAC Add 1 Rate Type References List, Retirement on Board's Share (IL and MO only) State Retirement System Deduction unselect all pay codes AFLAC Aflac Cancer Ins - 125 Start Date End Date Deduction AMERLIFE American Life Ins Co Deduction Exclude from Expense Payroll Exclude After Date so that a checkmark 12 DUES Dues-Missouri Education Asso Deduction Payee Check Information EQUITLIFE Equitable Life Ins Co does **not** appear next to Deduction PSRCL Payee ID GARNISH Garn-Clerk Of Cou Deduction any pay code ID. HEALTH125 Pay Group ID Travelers Health Ins 125 Deduction . HEALTHINS Travelers Health Ins Co Deduction W2 Information Leave the appropriate HORMANN Horace Mann Life Ins Co Deduction Retirement Plan (Box 13) HSA Individual Bank Acco taxes and the non-Health Savings Account Box 14 Description Federal Form Box ID Share to Print ► × 14 12 INLIFLIOE In Lieu of Insurance Δdd Employee Retirement certified retirement LTD Long Term Disability Deduction * X NWMUTLIFE Northwestern Mutual Life deduction selected. NYLIFE New York Life Ins Co Deduction PRUDENTIAL Report Option V Prudential Life Ins Co Deduction Then select the Print Gross Wage Print Employee Social Security Number RENT Rent Payment In Kind Retirement Certified certified teachers Print Employee ID Print Member Number RET Deduction Hide on Check Print Rate Table Description Check RET1 Retirement Certified 2/3 Rate Deductio ٠, retirement deduction so 🛞 🛞 🎯 💮 🗄 🦍 🕞 🗙 🖉 😓 🗄 Document Management: 🗁 🛊 🕅 False that a checkmark cord saved. appears next to it. See Diagram D Diagram D.
- 12. Click the **Save** button again.
- 13. When prompted to remove the cross references unselected in Step 11 from all employees for this particular deduction, click the **Yes to All** button.

Set Up the PSR Career Ladder Pay Code:

- 1. From the Payroll screen, select the **Maintenance** menu and then **Pay Codes**.
- 2. Click the **New Record** button to initialize the screen for a new entry, if needed.
- 3. In the Pay Code ID field, enter an ID to identify the Career Ladder pay code.
- 4. In the Pay Code Description field, enter a description for the pay code.
- 5. Select **Add** as the Pay Code Type.
- Select the appropriate cross references in the Cross References List. Be sure to select the PSR Deduction that was setup in the previous section, but do <u>not</u> select any retirement deduction. See Diagram E.
- 7. Click the **Save** button.

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Add the PSR Career Ladder Deduction to the Employee File:

- To add the PSR Career Ladder deduction to a group of employees:
- 1. From the Payroll screen, select the **Maintenance** menu and then **Employees**.
- 2. Select the **Options** menu and then **Adjust Deductions**.
- 3. Specify **Copy Existing** in the Adjust Option field.
- In the Existing Deduction ID field, enter the ID of the certified teachers retirement deduction ID. See Diagram F.
- 5. In the New Deduction ID field, enter the ID of the PSR Career Ladder deduction.
- 6. Do <u>not</u> select the Inactivate Old field.
- 7. Click the **Display** button.
- 8. Specify which employees to update from those that appear in the Employees Selection List by clicking the box for the Selected

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Diagram F

column to the left of the desired employee. A checkmark will appear in the box if the employee is selected.

- 9. Click the **Execute** button.
- 10. When prompted, click **Yes** to continue.
- 11. After the process is completed, a message will display in the status bar.

To add the PSR Career Ladder deduction to individual employees:

- 1. From the Payroll screen, select the Maintenance menu and then Employees.
- 2. Bring up the employee's record for which to add the PSR Career Ladder deduction by keying the ID for the desired employee in the Employee ID field, or click the **down-arrow** button or the **Find** button to select the employee.
- 3. Click the **Deductions** tab.
- 4. Enter the ID for the PSR Career Ladder deduction in the Deduction ID field, or click the **down-arrow** button to select the correct one.
- 5. Select the Active field in the Employee section. A checkmark will appear in the box if the field is selected.
- 6. If the deduction should be withheld or expensed every pay period, click the down-arrow button in the Deduction Frequency field (within the Employee Amounts List) and select Every Pay Period; if there are multiple payrolls in a month and the deduction should be withheld or expensed only during a certain week, select the appropriate week number instead. Then enter the description of the desired rate from the rate table in the Rate Description field.
- 7. Select the Active field in the Employer section. A checkmark will appear in the box if the field is selected.

- 8. If the deduction should be withheld or expensed every pay period, click the **down-arrow** button in the Deduction Frequency field (within the Employer Amounts List) and select **Every Pay Period**; if there are multiple payrolls in a month and the deduction should be withheld or expensed only during a certain week, select the appropriate week number instead. Then enter the description of the desired rate from the rate table in the Rate Description field.
 - File Options Reports Pin To Help Employee ID WILLBER Bert Williamson EMI A Employment History Military Service Positions Taxes Trainings Wages Work Comp Leaves ACA Hours Name & Address ACA 1095s Custom Fields Deductions Demographics Dependents Direct Deposit Education Benefits Certificates Emergency Contacts Emple Applies To: pr Individual Bank Account Deduction Expensed Payroll Deduction ID PSRCI Account Number ments Direct Deposit Transaction Code Direct Deposit Bank ID Standard Entry Class Code Addenda Amount Due = Declining Declining Active Active Balance Rate Type Percent Table Rate Type Percent Table Balance Start Date Annual Total Start Date Annual Total Regular Pay Period Only Regular Pay Period Only End Date End Date Process if No Pay Process if No Pav Employee Amo Empl Rate Change Date Rate Change Date New A Table Rate Deduction Frequency △ Rate Description Table Rate Deduction △ Rate Descriptio Table Rate Every Pay Period PSRS PSRS Every Pay Period • • Employee Deductions Cross References Employer Deduction ID $\bigtriangleup \nabla$ Deduction Description $\bigtriangleup \nabla$ Active $\bigtriangleup \mathbf{Y}$ Employee Rate Type State _ ID AV Description ΔV Туре PSRCL PSR Career Ladde 7 Percent Table RET Retirement Certified 7 Percent Table UNITEDWAY Federal Income Tax FIT Federal Income Ta: United Way 2 FUTA Federal Unemployment Tax Federal Unemployment Tax • MEDICARE Medicare Medicare 7 ٠ſ Diagram G
- 9. Click the Save button to add the deduction to the employee. See Diagram G.

Steps to Process the Career Ladder Payroll:

- 1. Make the Career Ladder payroll entries in the Pay Period Entries option.
- 2. If you have any questions on how to process the Career Ladder payroll, contact Customer Support as each district may process this payroll differently.

Steps to Complete the Missouri Retirement Report including the Career Ladder Payments:

- 1. From the Payroll screen, select the **Government Reporting** menu and then **Missouri Retirement Report**.
- 2. Complete the appropriate information for your district on the Report Options screen, and click the **Save** button
- 3. Click the **Deductions** tab.
- 4. For the PSR Career Ladder deduction, enter which share (**Employee**, **Employer**, or **Both**) of the deduction to include on the report under the Career Ladder column; then click the **Save** button.
- 5. Click the **Report Options** tab and then click the **Execute** button to generate the report.
- 6. Print the Missouri Retirement Report All Payroll Detail and/or the Missouri Retirement Report Payroll Contributions to view the career ladder payments.
- 7. The career ladder payments will also be included in the file created when completing the appropriate option accessed under the **Options** menu.