

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.

1. From the Payroll screen, select the **Maintenance** menu and then **Payees**. **Diagram A**
2. Bring up the certified teachers retirement payee by entering the ID in the Payee ID field, or click the **down-arrow** 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**.

Diagram B

Tip: To set up the payee to print an automatic payment stub during the check cycle rather than a check, click the **Miscellaneous** tab and select the Automatic Payment field.

Set Up the PSR Career Ladder Deduction:

1. From the Payroll screen, select the **Maintenance** menu and then **Deductions**.
2. Bring up the certified teachers retirement deduction by entering the ID in the Deduction ID 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 Payee ID field to reflect the payee 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 C

10. **Unselect** the Retirement Plan (Box 13) field in the W2 Information section so that a checkmark does **not** appear.

11. In the Cross References List, **unselect** all pay codes so that a checkmark does **not** appear next to any pay code ID. Leave the appropriate taxes and the non-certified retirement deduction **selected**. Then **select** the certified teachers retirement deduction so that a checkmark appears next to it. See **Diagram D**.

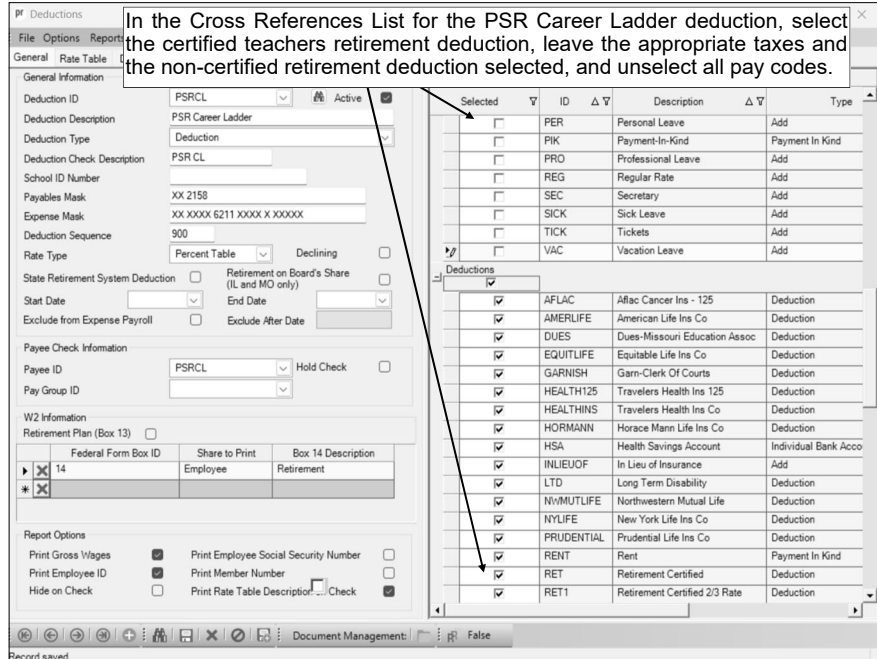


Diagram D

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.

6. 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 not select any retirement deduction.** See **Diagram E**.

7. Click the **Save** button.

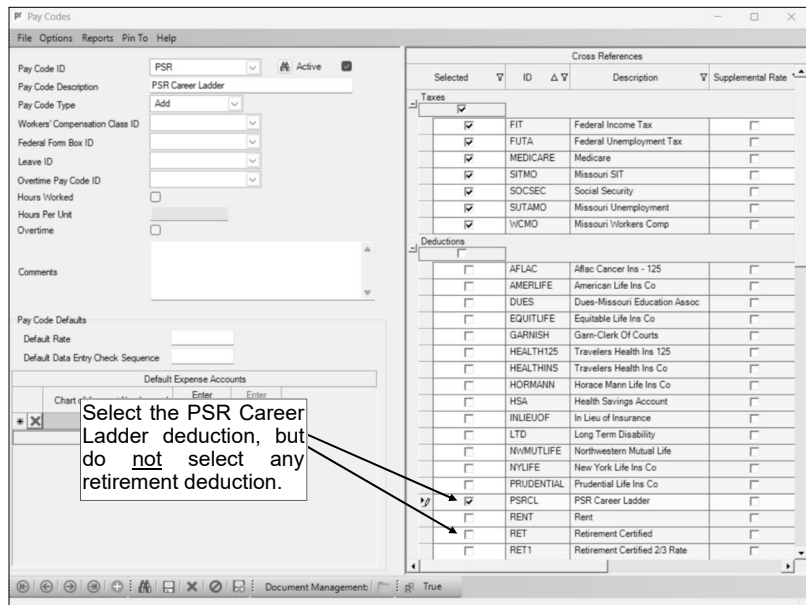


Diagram E

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.
4. 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.

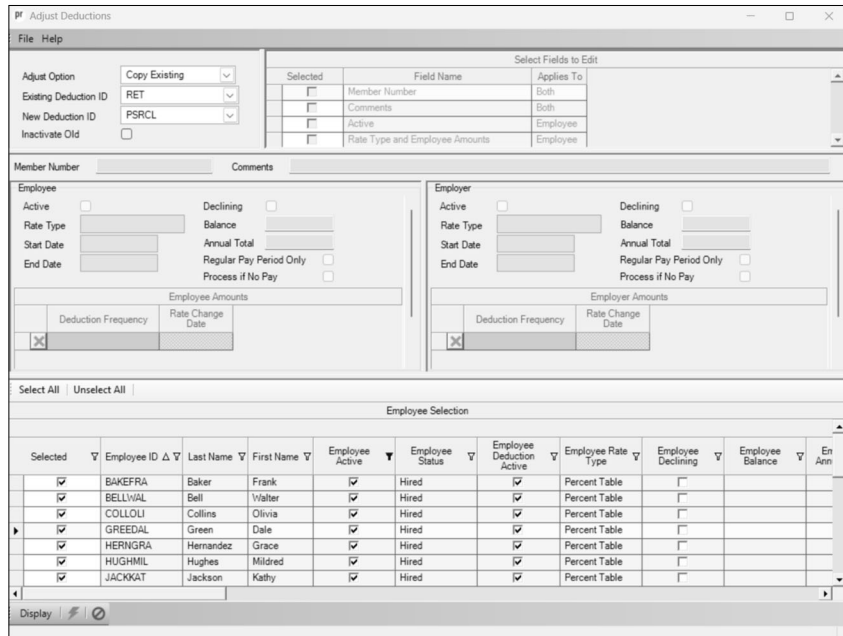


Diagram F

6. Do not 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 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.

- 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.
- Click the **Save** button to add the deduction to the employee. See **Diagram G**.

The screenshot shows the 'Employees' application window for Bert Williamson. The 'Deductions' tab is active, displaying the 'PSRCL' deduction. The 'Employer Amounts' table shows a deduction with a frequency of 'Every Pay Period' and a rate of '14.50'. The 'Employee Deductions' table lists 'PSRCL' as 'PSR Career Ladder' with a 'Percent Table' rate type. The 'Cross References' table shows 'FIT' (Federal Income Tax), 'FUTA' (Federal Unemployment Tax), and 'MEDICARE'.

Diagram G

Steps to Process the Career Ladder Payroll:

- Make the Career Ladder payroll entries in the Pay Period Entries option.
- 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:

- From the Payroll screen, select the **Government Reporting** menu and then **Missouri Retirement Report**.
- Complete the appropriate information for your district on the Report Options screen, and click the **Save** button
- Click the **Deductions** tab.
- 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.
- Click the **Report Options** tab and then click the **Execute** button to generate the report.
- Print the Missouri Retirement Report - All Payroll Detail and/or the Missouri Retirement Report - Payroll Contributions to view the career ladder payments.
- The career ladder payments will also be included in the file created when completing the appropriate option accessed under the **Options** menu.