

Automated Adjustments

Entering Automated Adjustments - Earnings

- To enter an Automated Adjustment you need to navigate to the page:
 Navigator > Payroll for North America > Payroll Customizations > Automated Adjustments
- To begin the Automated Adjustment entry process you will need to "Add a New Value"

Paysheet Adjustments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Company

Pay Group

Pay Period End Date

Empl ID

Paysheet Transaction Type

Transaction Status

[Find an Existing Value](#) | [Add a New Value](#)

3. Enter the following information:
 - a. Company – the employee’s home company
 - b. Pay Group – the pay group for the employee record that requires an adjustment
 - c. Pay Period End Date – the pay end date for the payroll to which the adjustment should load
 - d. Click “Add”

Paysheet Adjustments

Find an Existing Value
Add a New Value

Company

Pay Group

Pay Period End Date

Add

Find an Existing Value | Add a New Value

4. Fill in the employee specific information in the upper box for Earnings:
 - a. Employee ID
 - b. Employee Record
 - c. Earnings Code (can use “Look Up” for Earnings Codes in the employee’s Earnings Program see screenshot #1 below)
 - d. Combination Code (if required; can use “Look Up” see screenshot #2 below)
 - e. Amount (earnings can be position or negative)
 - f. Earnings Begin Date
 - g. Earnings End Date
 - h. Deductions Taken – (leave this section blank-see screenshot #3 below)
 - i. Separate Check – enter 1 for a separate check



Screenshot #1 – Earnings Code Look Up

Automated Adjustments

Company 390 Pay Group 39F

Employee Information

*Empl ID

Earnings

Earnings Code OVL Faculty Overload

Amount

Earnings Begin Date

Deductions Taken

Deductions

Plan Type

Deduction Code

One-Time Code

Save Return to Search

Look Up Earnings Code

Cancel

Search Results

View 100 First 1-94 of 94 Last

Earnings Code	Description	Short Description
A17	Non Resident Alien Income Code	A17
A18	Non Resident Alien Income Code	A18
A19	Non Resident Alien Income Code	A19
ACA	ACA Tracking	ACA
ADM	Non-Instructional Assignment	NonInstruc
AFF	Adjustment to FICA-SocSecMed	AdjustFICA
AFM	Adjust FICA, Fed WH, State WH	AdjFICA&W
AMM	Admin Leave-Exempt	AminLeave
AWD	Employee Award	Empl Award
CAC	Car Allowance -Non Pensionable	Car Allow
CAP	Car Allowance - Pensionable	Car AllowP
CAR	Car Allowance-Reportable	CarAllowRp
CCM	Campus Closure-Exempt	CmpClosur
CF7	Summer Comp for Research 17	CFR 17
CF8	Summer Comp for Research 18	CFR 18
CF9	Summer Comp for Research 19	CFR 19
CFR	Summer Comp for Research	SumResearc
COM	Communications Allowance	Com Allow
DFN	Dual Faculty-Non Ret Elig	DualFacNoR

Screenshot #2 – Combination Code Look Up

Automated Adjustments

Company 390 Pay Group 39F

Employee Information

*Empl ID

Earnings

Earnings Code OVL Faculty Overload

Amount

Earnings Begin Date

Deductions Taken

Deductions

Plan Type

Deduction Code

One-Time Code

Save Return to Search

Look Up Combination Code

Set ID 39000

Combination Code begins with

Description begins with

Short Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Combination Code	Description	Short Description
39010010106A	Acad Affairs, Provost & VP CIO	Acad Affai
39010010110A	Acad Affairs, Provost & VP CIO	Acad Affai
39010010115A	Acad Affairs, Provost & VP	Acad Affai
39010011105A	Provost-Special Project	Provost-Sp
39010011110A	Provost-Special Project	Provost-Sp
39010011205A	Provost - Graduate - Online	ProvGradOn
39010011305A	UG Online-College Portion	UG Online-
39010020110A	Instructional Technology	Instructio
39010040105A	Academic Personnel Recruitmen	Academic P
39010040105B	Academic Personnel Recruitmen	Academic P
39010040105R	Academic Personnel Recruitmen	Academic P
39010040110A	Academic Personnel Recruitmen	Academic P
39010040110B	Academic Personnel Recruitmen	Academic P



Screenshot #3 – Deductions Taken

Automated Adjustments

Company 390 Pay Group 39F Pay Period End Date 09/30/2017

Employee Information Find | View All First 1 of 1 Last

*Empl ID Empl Record

Earnings

Earnings Code Extra Pay Annualized - Faculty Combination Code

Amount

Earnings Begin Date Earnings End Date

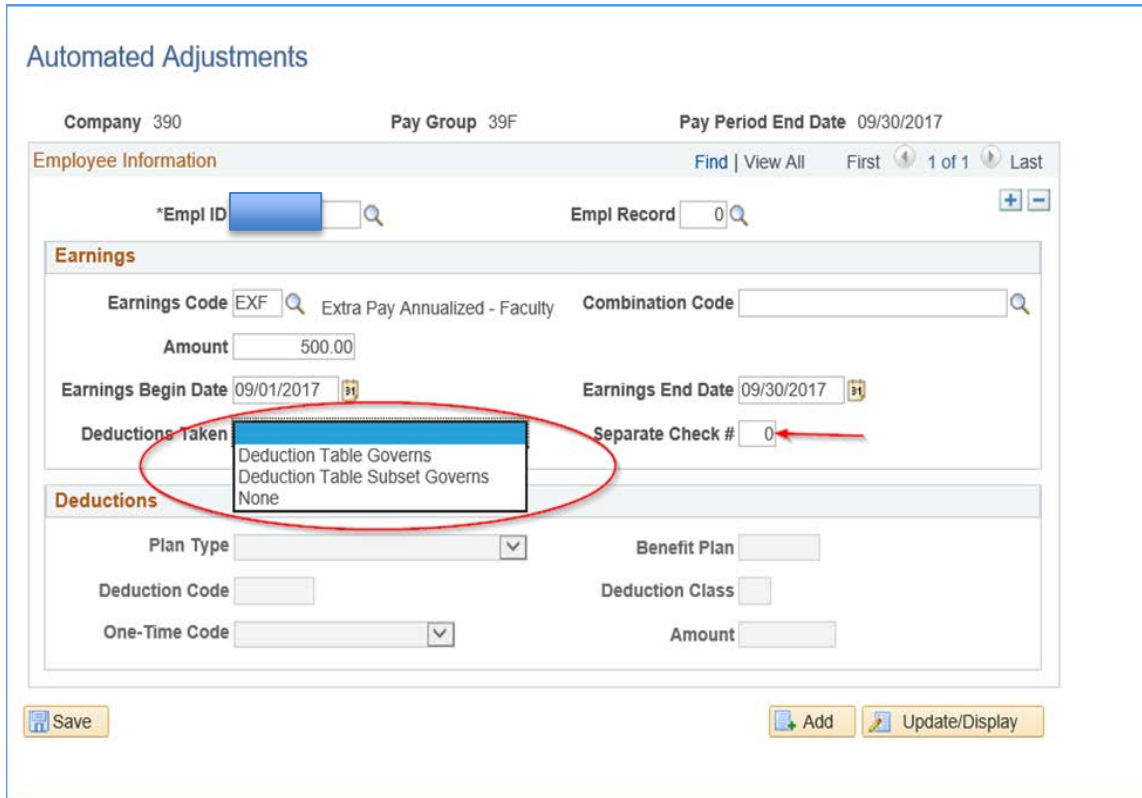
Deductions Taken Separate Check #

Deductions

Plan Type Benefit Plan

Deduction Code Deduction Class

One-Time Code Amount



Loading Automated Adjustments - Earnings

1. Access the Run Control page for Automated Adjustments Load:

Path: Navigator > Payroll for North America > Payroll Customization > Automated Adjustments Load

- a. Enter the Pay Run ID
- b. Save the Run Control page
- c. Click "Run"

d. On the Process Scheduler Request page be sure there is a check box for Automated Adjustment Load

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Automated Adjustments Load	BOR_PSHUP_LD	Application Engine	Web	TXT	Distribution

e. Select the Blue Link to the Process Monitor

f. Click the "Refresh" button until the process goes from Queued to Success and Posted

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	125012		Application Engine	BOR_PSHUP_LD	ITS_DSTRENKOWSKI	10/09/2017 2:11:05PM EDT	Queued	N/A	Details
<input type="checkbox"/>	124936		COBOL SQL	PSPPYRUN	ITS_DSTRENKOWSKI	10/09/2017 10:52:05AM EDT	Success	Posted	Details

2. To validate that the Automated Adjustment processed successfully there are two ways you can validate:
 - a. Return to the Automated Adjustments entry screen and enter the EMPL ID in the Search Criteria and click "Search". You will see the message "Record has been processed"



Automated Adjustments

Company 390 Pay Group 39F Pay Period End Date 09/30/2017

Employee Information Find | View All First 1 of 1 Last

*Empl ID Empl Record

Earnings

Earnings Code OVL Faculty Overload Combination Code 39010080110A

Amount 3500.00

Earnings Begin Date 09/01/2017 Earnings End Date 09/30/2017

Deductions Taken Separate Check # 0

Deductions

Plan Type Benefit Plan

Deduction Code Deduction Class

One-Time Code Amount

Record has been processed

Save Return to Search Add Update/Display

- b. Run the query BOR_PY_PYLOAD and enter the Pay Period End Date when prompted. The employees with Automated Adjustments that loaded to the Automated Adjustment Staging Table will be returned.

Entering Automated Adjustments - Deductions

1. To enter an Automated Adjustment for deductions you need to navigator to the page:

Navigator > Payroll for North America > Payroll Customizations > Automated Adjustments

These adjustments are similar to the earnings adjustments but require deduction specific information to be entered in the Deductions section.

2. If there is a deduction Automated Adjustment for an employee who already has an earnings Automated Adjusted for the same Pay Period End Date just click on the . For a new Company/Pay Group/Pay Period End Date click the "Add" button.
3. Navigate to the lower portion of the Automated Adjustments Page to the Deduction box. Enter the following information:
 - a. Plan Type (see Screenshot #1 for options)
 - b. Benefit Plan (not required for General Deduction)
 - c. Deduction Code (see Screenshot #2 for Look Up)



- d. Deduction Class
- e. One-Time Code
- f. Amount (Only positive, flat amounts can be entered)

Screenshot #1 – Plan Type

The screenshot shows the 'Automated Adjustments' form with the following fields and values:

- Company: 390
- Pay Group: 39F
- Pay Period End Date: 09/30/2017
- Employee Information: Find | View All | First 2 of 3 Last
- *Empl ID: [input field]
- Empl Record: 0
- Earnings Code: [input field]
- Combination Code: [input field]
- Amount: [input field]
- Earnings Begin Date: [input field]
- Earnings End Date: [input field]
- Deductions Taken: [dropdown menu]
- Separate Check #: 0
- Plan Type: General Deduction (dropdown menu is open)
- Benefit Plan: [input field]
- Deduction Class: [input field]
- Amount: [input field]
- One-Time Code: [input field]

The dropdown menu for Plan Type is open, showing the following options:

- 401(k)
- 403(b)
- 529 Savings
- General Deduction (highlighted)
- ROTH 403(b)
- ROTH 457(b)
- Retirement Plans

Buttons at the bottom include Save, Return to Search, Add, and Update/Display.

Screenshot #2 – Deduction Code

The screenshot shows the 'Automated Adjustments' form with the 'Look Up Deduction Code' pop-up window open. The form fields are the same as in Screenshot #1. The 'Deduction Code' field in the Deductions section is circled in red. The pop-up window shows the following fields:

- Plan Type: General Deduction
- Deduction Code: begins with [input field]
- Description: begins with [input field]
- Buttons: Look Up, Clear, Cancel, Basic Lookup

The 'Search Results' section of the pop-up window shows a list of deduction codes and descriptions:

Deduction Code	Description
00AAUP	Amer Assoc of Univ Professors
00ACTR	Accounts Receivable
00ALUM	Alumni Association
00ATHL	Athletics
00CAPI	Capital Campaign/Annual Giving
00CHAR	State Charitable Donation
00COM	Communication Allowance
00ERSE	ERS ER Pick-Up
00FIT	Recreation/Fitness/Wellness
00FNDR	Foundation - Restricted
00FNDR	Foundation - Unrestricted
00GARN	Garnishments
00GARR	Garnishment Refund
00HOUS	Housing/Rental
00MEAL	Meal Plan
00MSCA	Miscellaneous After Tax
00MSCR	Miscellaneous Before Tax

Screenshot #3 – One-Time Code

Automated Adjustments

Company 390 Pay Group 39F Pay Period End Date 09/30/2017

Employee Information Find | View All First 2 of 3 Last

*Empl ID Empl Record

Earnings

Earnings Code Combination Code

Amount

Earnings Begin Date Earnings End Date

Deductions Taken Separate Check #

Deductions

Plan Type General Deduction Benefit Plan

Deduction Code 00CHAR Deduction Class A

One-Time Code
 Addition
 Override
 Refund

Save Return to Add Update/Display

Addition: Deduction will load and add to the existing deduction amount
 Override: Deduction will load and replace the existing deduction amount
 Refund: Deduction will load and subtract from the existing deduction amount. If the existing deduction amount is zero the employee will receive a refund for the full amount entered.

*OneUSG Connect cannot process a negative override, use refund option.

4. To load deduction Automated Adjustments follow the same process for loading Automated Adjustments-Earnings.
5. To validate that the Automated Adjustment processed successfully there are two ways you can validate:
 - a. Return to the Automated Adjustments entry screen and enter the EMPL ID in the Search Criteria and click "Search". You will see the message "Record has been processed".



Automated Adjustments

Company 390 Pay Group 39F Pay Period End Date 09/30/2017

Employee Information Find | View All First 2 of 2 Last

*Empl ID 0041134 Empl Record 0

Earnings

Earnings Code Combination Code

Amount

Earnings Begin Date Earnings End Date

Deductions Taken Separate Check # 0

Deductions

Plan Type General Deduction Benefit Plan

Deduction Code 00CHAR Deduction Class A

One-Time Code Addition Amount 25.00

Record has been processed

Save Return to Search Add Update/Display

- b. Run the query BOR_PY_PYLOAD and enter the Pay Period End Date when prompted. The employees with Automated Adjustments that loaded to the Automated Adjustment Staging Table will be returned.

