USPS New Contract Instructions
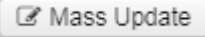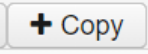
Processing>New Contract is designed to calculate and create new compensation information for employees. New Contracts can be built from existing contracts or imported from a spreadsheet. When activated, the new contract data will create a brand new compensation record.

Job Calendars

For appropriate New Contract calculations (Contract Work Days & Unit Amount) to occur, Job Calendars for the upcoming contract year must be created/updated before utilizing New Contract. For basic instructions on updating Job Calendars, use the following steps:

1. Go to Core>Job Calendars
2. Click ✎ beside an existing calendar to modify
3. Enter range of new dates (for example: Start Date = 8/15/XX & Stop Date = 5/31/XX)
4. Choose Work Day from the Type drop down
5. Click ✎ Mass Update
6. Scroll through the Calendar to modify individual days as necessary (Right-click a specific date and select Holiday, Non-Work Day, etc.)
7. Verify day counts in the Day Count Totals box at top right (for example: Enter Custom Start = 8/15/XX & Stop = 5/31/XX, then tab, see the total Work days beside Custom Date Range)
8. Once all Work Days, Holidays, Non-Work Days, etc. have been entered, click ✔ Save

Once a Job Calendar is updated, days can be copied to similar calendars so that each does not need modified manually.

1. Go to Core>Job Calendars
2. Click + Copy
3. Select the calendar you just updated in Copy From
4. Enter Start Date and End Date range (of the dates to copy from one calendar to others)
5. In the Copy To section, select the Calendars you wish to copy to
6. Click ✔ Copy
7. Return to the grid Edit individual calendars that need modification (step 6-8 from above).

If a new Job Calendar is needed, click **+ Create** at the top of the grid. The calendar can be given a Type (or abbreviated code) and a Description. Follow the instructions above to add days to the calendar. Once complete, be sure to Save.

+ Mass Change can be used to update a type of day across several calendars with a single entry. Simply enter the date, use the Update to selection to choose what type of day (Work, Holiday, Calamity, etc.), and select the Calendars to update from the Available list. Once Saved, all selected calendars will be updated.

Finally, Reports>Job Calendar Report can be used to review and print specified Job Calendars.

Note: the Default calendar does not need to be updated for each month in the new year. As long as the Default calendar type exists, it is pretty much self-sufficient in Redesign (not like Classic). It is not recommended to add work days to the Default calendar.

Also, when adding work days to the August calendar for the upcoming contract year, be sure that the current Compensation Stop Date is prior to any new August work days. This will prevent the current contract from counting too many work days. Contracts should not overlap.

New Contract

Once all Job Calendars are completed for the upcoming contract year, new contracts (or compensation records) can be created. In Redesign, this can be done three ways:
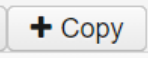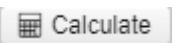
New Contract Maintenance	Mass Copy Compensations	Import New Contracts

New Contract Maintenance is used to copy an individual employee's prior compensation record to create a new compensation record or to a create a mid-year contract change. Mass Copy Compensations is used to build new contracts based upon Pay Groups and Job Status. This option is commonly used by districts on a pay freeze. Import New Contracts can be used to create many new contracts at once using a spreadsheet.

New Contract Maintenance

Along with creating new compensations, you will also use this tab to review what is done via the Mass Copy or Import tabs since that info will populate data into the New Contract Maintenance grid. You can view, edit, delete, or activate existing new contracts as needed as this is a "temporary holding area" until activation. To create a new contract:
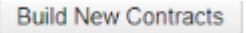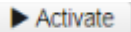
1. In Processing>New Contract, click the New Contract Maintenance Tab
2. Click **+ Copy** to add a new contract for an individual employee
3. Select the Employee from the drop down list (type a few characters of the first or last name to filter)
4. Choose the Compensation to copy from (any un-archived compensation will be available)
5. Choose "New Contract" as the Contract Type
6. Type or choose the Contract (Compensation) Start Date from the date picker. This will be the first work day of the new contract.
7. Type or choose the Contract (Compensation) Stop Date from the date picker. This will be a date within the employee's final payroll period date range, prior to the first work day of the next contract.
8. When the new contract is displayed, use the **○ Clear** button to remove any calculated fields that were brought in from the prior contract (to start from a blank compensation). Input values in all fields necessary to complete the new compensation (Job Calendar, New Compensation Start Date, New Compensation Stop Date, New Retirement Hours, New Contract Work Days, New Pay Unit, New Hours in Day, Position Related fields, New Pays In Contract, New Stretch Pay, New Calendar Start Date, New Reportable to EMIS, etc.)
9. Update appropriate fields for the new contract year (New Label, New Contract Amount, New Contract Obligation, New Salary Schedule fields)
10. Once done entering updates, click **▦ Calculate**
11. Verify New Unit Amount, New Pay Per Period, and New Contract Work Days calculated as desired
12. Click **✔ Save**
13. To Activate, check the box beside the new contract record and click **▶ Activate** at the top of the grid. See below for more information on Activating New Contracts.

Note: New Contracts can be activated ahead of time and will pull into payroll based on the compensation start date falling with the payroll period beginning and ending date range. Substitutes are typically set up as non-contract compensations in Redesign. New Contract is only for contract compensations.

Mass Copy Compensations

This option can be used to create new contracts based upon pay groups and job status as of a specific date. New contracts will be created using existing compensation information. This option is useful as a starting point for small pay groups or if the district is on a pay freeze.

1. In Processing>New Contract, click the Mass Copy Compensations tab
2. Choose the Job Status of the compensations to mass copy (*Active*, *Inactive*, or *Active and Inactive*)
3. Click the box to include archived employees
4. Click the box to include archived compensations
5. Enter the date to Include compensations active as of (will eliminate compensations with a Compensation Start Date after this date and with a Compensation Stop Date prior to this date)
6. Select the Pay Groups to mass copy by using ![>] to move from the Available list to the Selected list.
7. Type or choose the Contract (Compensation) Start Date from the date picker (first work day of new contract). Type or choose the Contract (Compensation) Stop Date from the date picker. This will be a date within the employee's final payroll period date range, prior to the first work day of the next contract.
8. Based on your selections, review the number of compensations selected for build
9. Click ![Build New Contracts]
10. The New Contracts will appear on the grid in the New Contract Maintenance tab. To Edit, click ![edit icon] next to the new contract record.
11. When the new contract is displayed, verify that fields were copied and calculated as intended (Job Calendar, New Compensation Start Date, New Compensation Stop Date, New Retirement Hours, New Contract Work Days, New Pay Unit, New Hours in Day, Position Related fields, New Pays In Contract, New Stretch Pay, New Calendar Start Date, New Reportable to EMIS, etc.)
12. Update appropriate fields for the new contract year (New Label, New Contract Amount, New Contract Obligation, New Salary Schedule fields)
13. Once done entering updates, click ![Calculate]
14. Verify New Unit Amount, New Pay Per Period, and New Contract Work Days calculated as desired
15. Click ![Save]
16. To Activate, check the box beside the new contract record and click ![Activate] at the top of the grid. See below for more information on Activating New Contracts.

Note: New Contracts can be activated ahead of time and will pull into payroll based on the compensation start date falling with the payroll period beginning and ending date range. Substitutes are typically set up as non-contract compensations in Redesign. New Contract is only for contract compensations.
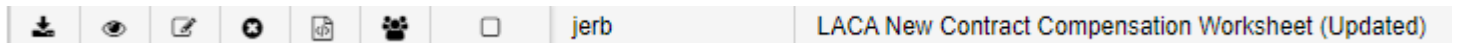
Import New Contracts

This option will allow a correctly formatted CSV file to be imported with new contract information. For the spreadsheet to be correctly formatted, the data columns must contain the appropriate heading information in row one. The headings are case sensitive and must match what is defined in the **New Contract Chapter** in the USPS-R User Manual in order for the Import program to recognize and load the data.

Note: There are four required fields on the new contract CSV file: employeeId, jobNo, contractType and compensationLabel. Label is only required if the employee has more than one Compensation for a Position. Be sure not to delete these columns prior to importing the file. The remainder of the data available is optional and will be dependent upon the contract type being imported. Another field, contractAmount, is required for stretch paid jobs.

1. In Reports>Report Manager, generate the LACA New Contract Compensation Worksheet (Updated)

2. In the Report Options tab, enter a Compensation Start Date that will bring in all contracts from the prior year.
3. Use the Pay Group parameter to filter on specific pay group(s). Multiple pay groups can be separated by a comma. If no Pay Group is entered, all compensations on or after the Compensation Start date will be included.
    For example:

4. Click to create the worksheet.
5. Review the spreadsheet and make changes as necessary to the following fields: newCompensationLabel, contractStartDate, contractStopDate, contractAmount, paysIncontract, salaryScheduleColumn, salaryScheduleId, salaryScheduleStep, & hoursInDay (a listing of all field names can be found here).
6. Change contractType to show (1, 2, 3, or **4**) based on the following:

- **1** - Mid-year change with no Retro
- **2** - Mid-year change with Retro spread over pays
- **3** - Mid-year change with lump sum retro
- **4** - New Compensation or New Contract

7. Change equalPays column to Y for each row (Import will error if True, but not for Y)

Note: Contract Work Days (from Work Days on the calendar between the Compensation Start & Stop dates), Unit Amount, Pay Per Period & Contract Obligation will all calculate properly after import. It is recommended to remove these columns from the import worksheet. If not, what is in the spreadsheet will import.

8. Remove any other unused or unchanged non-mandatory columns from the spreadsheet. (*For example: **Last Name** – Special Characters like "'" in O'Dell or "–" in Harris-Sanders can cause a New Contract record to fail*)
9. When all updates are completed, Save As a CSV file.
10. Return to USPS-R>Processing>New Contract, Import New Contracts tab.
11. Click [Choose File] to select the previously created CSV file.
12. A Contract Start Date can be entered if not provided on the import file. Otherwise, it can be left blank.
13. Click [Import]
14. New Contract records can be viewed from the New Contract Maintenance grid or using New Contract reports (next section) to ensure accuracy. If changes are required, the [✎] button can be used to edit a New Contract.
15. Use reports (listed below in the New Contract Reports section) to review information.
16. To Activate, check the box beside the new contract record and click [▶ Activate] at the top of the grid. See below for more information on Activating New Contracts.

Note: New Contracts can be activated ahead of time and will pull into payroll based on the compensation start date falling with the payroll period beginning and ending date range.

New Contract Reports

After new contracts are created, there are some optional reports available for verifying data. These reports are only available while the records are in the New Contract Maintenance grid, prior to activating.
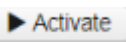
- Reports>**New Contract Report** – Generates a listing of all New Contract information that has been created
- Reports>Report Manager> **SSDT New Contract Summary Report** – Will show a summary of New Contract data for each record
- Reports>Report Manager>**SSDT New Contract Payroll Accounts** report – To review active payroll accounts for each employee

Activating New Contracts

Activating new contracts will create new compensation records (compensations will not be overwritten). As noted previously, new contracts can be activated at any time because of the use of Compensation Start and Compensation Stop Dates. If desired, new contracts can also be activated after the final pay of the prior compensation is complete.

It is important to ensure that the period beginning and ending dates of the final pay on the old compensation does not include the new compensation start date (typically the first work day of the new contract year). *Payroll additions will often be necessary on the last pay of the old compensation and the first pay of the new contract.* The New Contract Activation Worksheet is helpful to plan which pays need additions and what the additions need to be.

Individual records in New Contract can be activated or several (all) records can be activated at once. *New contract records must be activated before initializing a payroll for newly created compensations.* To activate:

1. In Processing>New Contract, click the New Contract Maintenance tab
2. Check the box beside the record(s) that will be activated. Selected records will be highlighted blue. To select all records, check the box in the upper right corner of the grid.
3. Click the ▶ Activate button

4. An information box will appear to let you know how many new contracts will be activated. There is also an option to transfer the Primary Compensation flag to the new compensation. The Primary Compensation flag identifies a compensation for filtering/reporting purposes and has no impact on the use of the compensation within a payroll. Identifying Primary Compensations is optional for each district. However, it is recommended to check the box for transferring in case the district wants to track primary compensations in the future.

5. Click ✔ Activate . This will create a new compensation record for the employeee and remove the record from the New Contract grid.
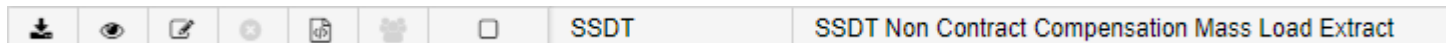
Non Contract Compensations

Mass Load

Creating new or updating existing Non Contract Compensations does not utilize New Contract. Instead, this is done using Mass Load. This is often used to update the Unit Amount of existing non contract compensations.

1. In Reports>Report Manager, generate the SSDT Non Contract Compensation Mass Load Extract. This will create an Excel spreadsheet of every non-contract compensation.

2. The data in the file should be filtered and manually updated (removing any record that will not be updated).
   - To update an existing non-contract compensation record, keep the existing code in the spreadsheet (for example if only updating the Unit Amount of substitutes).
   - To add a new non-contract compensation record, enter a unique code in the spreadsheet (recommend using the current date-A or ######-A).
3. Save the spreadsheet as a CSV file.
4. Go to Utilities/Mass Load
5. Browse to find your csv file, select Importable Entity of Compensation, and click **Load**
6. View error file. If there are any errors, the error file can be corrected and re-loaded using steps 3-6.
7. Then view the record(s) in Core/Compensation

Mass Change

An alternative way updating the Unit Amount of Non Contract Compensations is using Mass Change.

1. Go to Core>Compensation
2. Filter the grid to only display the compensations that need updated (for example, Type=Non Contract, utilizing a specific Pay Group, Unit Amount, or using the wild card to find a certain description %sub%)
3. Click **Mass Change** at the top of the grid.
4. Choose "LACA Change Unit Amount" from the drop box.
5. Review the NOTE which previews the total number of records that will be modified. More filters may need used to reduce the amount of records.
6. Use the **New Rate** [   ] box to type the New Rate (Unit Amount)
7. Click **Submit Mass Change**