



HRIS Job Role Training

Retroactive Pay Change
Forms: ZR131

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Introduction

Retroactive pay is used when an employee has had a pay change that should have been processed sometime in a prior pay period and as a result the employee has been over/under paid.

In HRIS, the *Agency Retroactive Pay Calc (ZR131)* provides the steps necessary to recalculate past payroll processing for an individual and creates the necessary records for any differences that occurred between the original pay and the recalculated pay.

- Retroactive Pay may be a result from a scenario where an Employee's pay information changed but notification of the change was keyed late into HRIS. There must be a pay change in order to cause a retroactive pay correction.
- Agency Retroactive Pay Calc (ZR131) is **not used** when completing prior pay period adjustments. These are to be completed using the Detailed Time Entry (XR35.2). For example: An employee was not paid for 5 hours, the time was submitted after payroll cut-off and payroll has already processed.
- Employee must be paid at the correct rate for all hours worked, including those hours paid at overtime rates. HRIS recalculates an Employee's pay including overtime based on FSLA rules.
- If you process a retroactive pay increase for non-exempt employees, the Overtime Calculation will be updated during the regular payroll processing.

Notes

The ZR131 has been modified to include three update options on the Time Record field instead of two.

- Update; Recreate Time Records (U): Allows user to recreate time records by deleting all existing retro time records and recreating retro time records based on job parameters
- Report (R): Allows user to run a report to produce an edit report without creating actual time records
- Update; Add Time Records (A): Allows user to add time records to create additional retro time records based on new parameters

If the Employee has a Retroactive Pay Action that affects more than one point in time and should be applied to an old pay grade range then separate actions should be completed. If this is the case, select the Update Option of "U" Update; Recreate Time Records after the first action has been entered. Running any additional ZR131 for the same EIN, using the same update function will continue to add time records.

HRIS highly recommends that ZR131 is run in REPORT MODE prior to UPDATE MODE to verify calculations. **Please read this manual in its entirety, as it explains how to complete this process step by step.**

Form Details

Agency Retroactive Pay Calc (ZR131) – Selection Link

The screenshot shows the HRIS Agency Retroactive Pay Calc (ZR131) form. The interface includes a top navigation bar with the HRIS State of Arizona logo, a user welcome message 'Welcome Frank [logout]', and a search box containing 'ZR131'. Below the navigation bar is a toolbar with buttons for '+ Add', 'Change', '- Delete', '< Previous', '? Inquire', '> Next', and 'Inquire'. A 'Related Forms' dropdown menu is also present.

The main form area contains several input fields and buttons:

- Submit** button (callout 2)
- Reports** button
- Job Sched** button
- Print Mgr** button
- Job Name**: ZR1366504 (callout 2)
- Job Description**: RETRO FOR EIN 66504 (callout 3)
- User Name**: fxm60026 Frank Morin (callout 3)
- Product Line**: FUNC803

The **Parameters** section is expanded, showing two tabs: **Selection** and **Time Record** (callout 9). The **Time Record** tab contains the following fields:

- Company**: 1 (callout 4)
- Employee**: 66504 (callout 5)
- Date**: 06/01/2008 - 07/30/2008 (callout 6)
- Pay Class**: RET (callout 7)
- Min Max Limits**: [Y] [] (callout 8)

The bottom of the screen shows a Windows taskbar with 'Done', 'Internet', and '100%' zoom level.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	HRIS Search Box	R	Type ZR131 and Press Enter	ZR131 form appears	
2	Job Name Field	R	Type a unique name for the report you will be running.		<ul style="list-style-type: none"> • Job Name cannot contain more than 10 characters. • No spaces allowed. • The job name should be unique for each Employee or action, otherwise you will overwrite the information on the original report
3	Job Description Field	R	Type a unique description for the report you will be running.		<ul style="list-style-type: none"> • Field is a maximum of 30 characters. Description can include spaces and special characters (ex. – or _) • It is recommended to include the Employee's EIN or Name as a reference
4	Company Field	R	Select or Type your Company		Company will always be '1'
5	Employee Field	R	Select or Type the Employee's Identification Number (EIN)		
6	Date Field	R	Select or Type the date range related to the time period in which the Employee is due retroactive pay.		<ul style="list-style-type: none"> • Date must be entered as MMDDYYYY • If you have more than one date range you will need to complete more than one retroactive pay process/report. • Date range must include a beginning and ending date. <ul style="list-style-type: none"> ○ If you are doing a retroactive for a single day

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
					you need to enter the same date in both the beginning and the ending fields.
7	Pay Class Field	R	No Action Required	RET will always appear in this field on the form. You cannot change this value.	The RET pay class includes all the pay codes that are affected by a retroactive pay action
8	Min Max Limits Field	R	Select either Y or N	<p>If 'Y' is selected</p> <ul style="list-style-type: none"> ➤ HRIS will look at the salary range for the Employee's current grade. <p>If 'N' is selected</p> <ul style="list-style-type: none"> ➤ The transaction will not look at the salary range for the Employee's current grade. 	<ul style="list-style-type: none"> • This field determines how the retroactive pay will be calculated. • 'N' is the default. • N should be selected if the retroactive pay action does not fall within the current salary range for the Employee's current grade or if the employee is in a step and grade salary schedule.
9	Time Records Link	R	Click Time Record under the Related Pages	This will take you to the Time Record page of the form.	

Agency Retroactive Pay Calc (ZR131) – Time Record Link

The screenshot displays the HRIS Agency Retroactive Pay Calc (ZR131) interface. At the top left is the HRIS State of Arizona logo. The page title is "Agency Retroactive Pay Calc (ZR131)". A navigation bar includes buttons for "Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire". A "Related Forms" dropdown is on the right. Below the navigation bar are buttons for "Submit", "Reports", "Job Sched", and "Print Mgr". The form fields are: Job Name (ZR1366504), Job Description (RETRO FOR EIN 66504), User Name (fxm60026 Frank Morin), and Product Line (FUNC803). A "Parameters" section is below, with tabs for "Selection" and "Time Record". The "Time Record" tab is active, showing fields: Retro Percent (2.0), Retro Pay Code (144), Time Record Date (08/01/2008), Distribution Option (C), Update Option (R), and Employee Sequence (A). A "Current Distribution" label is also present. A callout box with the number 7 points to the "Add" button. The bottom of the screen shows a taskbar with "Done", "Internet", and "100%" zoom.

	HRIS Field	R / O	Step/Action	Expected Results	Notes / Additional Information
1	Retroactive Percent Field or Amount Per Hour Field	R	Type the Amount per hour	Enter Amount Per Hour only. HRIS does not want ZR131 run by Retroactive %	The amount per hour can be a positive or a negative and must be determined by agency. Please do not use the Retroactive Percent.
2	Retroactive Pay Code Field	R	Select or Type the correct Retroactive Pay Code		You should always enter '144'
3	Time Record Date Field	R	Enter the applicable Time Record Date. Leave this field blank if employee is in a non-exempt (NEXP) or exempt (EXP) Pay Plan		Field will be different depending on the type of Employee. <ul style="list-style-type: none"> • If an employee is in an excluded (EXC) Pay Plan, the Time Record Date must be the last day of the pay period for the retroactive time record. • If the employee is in a non-exempt (NEXP) or exempt (EXP) Pay Plan, the Time Record Date must be left blank.
4	Distribution Option field	R	Field defaults to 'C'.		This field should always default to "C" –"Current Distribution". By selecting "C" – time record will be created using employee's current Labor Distribution as defined on HR11.
5	Update Option field	R	Select Update Option		Retroactive Jobs will always be run twice. The first time in Report Mode, the second time in Update Mode.

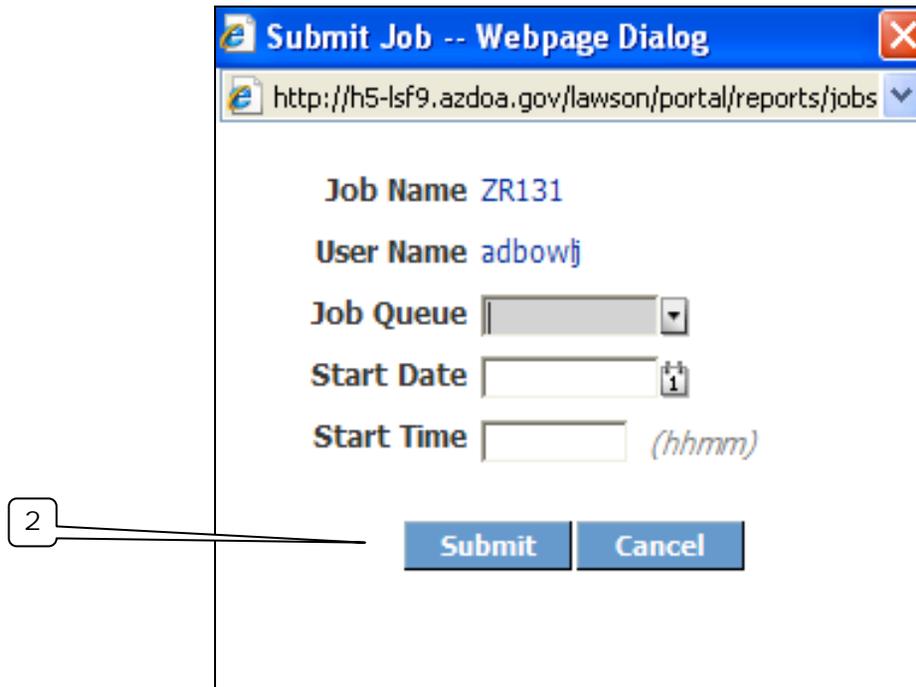
	HRIS Field	R / O	Step/Action	Expected Results	 Notes / Additional Information
					At this step, select 'R' for report mode.
6	Employee Sequence field	R	Select or Type the desired Employee Sequence		This will be 'A' for Alpha or 'N' for Numeric.
7	Add button	R	Click Add to save your Retroactive job.	Be certain to look at the bottom of your screen for the message " Add Complete "	This adds the report that needs to be submitted.

Agency Retroactive Pay Calc (ZR131) – Submit Retroactive Job to Process

After you have added your job (by clicking Add) you must submit the Retroactive Job to be processed by HRIS. The steps to submit a job must be completed as follows:

	HRIS Field	R/O	Step/Action	Expected Results	Additional Information
1	Submit Job Link	R	Click Submit (located under Related Actions)	Another window will pop up (see below – Job Submit graphic).	This submits the job to HRIS to process.

	HRIS Field	R/O	Step/Action	Expected Results	Additional Information
2	Submit button	R	Click Submit again	You will go back to the ZR131 screen	Leave the Job Queue, Start Date and Start Time fields blank. Your job is being processed by HRIS.



Agency Retroactive Pay Calc (ZR131) – View Results of Retroactive Job

Once your job has been submitted and processed you can then view results in one of two places: Reports Queue or the Print Files Queue. You can check the status of your job by accessing the Job Scheduler.

Notes

- REMEMBER: At this point, report has only been submitted in 'Report Mode', which means the Employee's record has not been updated. If the results are correct, the job will have to be resubmitted in Update mode or the Retroactive Pay Time Record will not be created and the Employee will not be paid the Retroactive Pay monies.

For ZR131, if the results are correct, you must still run the same job in Update mode to change the Employees record (see Agency Retroactive Pay Calc (ZR131) – Resubmit Retroactive Job in Update Mode (Page 14))

	HRIS Field	R/ O	Step/Action	Expected Results	Additional Information
1	Print Manager	O	Click Print Manager to display results.		Print Manager can be used to display all of your reports that have been processed.

Agency Retroactive Pay Calc (ZR131) – Print Files Link

Print files can be used to review your completed results. To print the results of your report, you must always access the PDF option in the report results the print feature in Print Files cannot be used.

For ZR131, if the results are correct, you must still run the same job in Update mode to change the Employees record (see Agency Retroactive Pay Calc (ZR131) – Resubmit Retroactive Job in Update Mode (Page 14))

The screenshot shows the HRIS Print Manager interface. At the top left is the HRIS State of Arizona logo. The user is logged in as 'Connie' and the user ID is 'cxm58048'. The search criteria is 'zr131'. The interface includes buttons for 'Report Actions', 'Inquire', 'Search', 'Find Next', 'Reset', and 'Printable View'. A 'User Name' field contains 'cxm58048'. Below this is a table with the following data:

<input type="checkbox"/>	Job Owner	Job Name	Description	Parameters	File Name	Created
<input type="checkbox"/>	cxm58048	ZR.13166505	RETRO FOR EIN 66504	ZR.131	ZR.131.prt	05/04/2009 15:54:40
<input type="checkbox"/>	cxm58048	ZR.13166505	RETRO FOR EIN 66504	ZR.131	error	05/04/2009 15:54:30

	HRIS Field	R/O	Step/Action	Expected Results	Additional Information
1	Report Name link	R	Click on the display line for the report you would like to view.	This row will be highlighted	
2	View link	R	Click on View (under Related Actions) to display report results.	The report results will display	Report results will display in the default format for your machine (most are Text or PDF)

Agency Retroactive Pay Calc (ZR131) – Job Scheduler Link

The Job Scheduler can be used to check the status of a submitted job. The job can only be viewed when it appears in the Completed tab (under Filter Options).

The screenshot displays the HRIS State of Arizona Job Scheduler interface. The title bar shows "ZR131.prt (Job ZR13166505 - Step 1)" and "Welcome Connie [logout]". The interface includes a navigation menu with "Home", "Back", "Print", "Create CSV File", and "View Options". A search bar contains "zr131". A "Related Reports" dropdown is visible on the right. The main content area shows job submission parameters and retroactive pay details.

Job Submission Parameters:

```
ZR131 Date: 05/04/09      JOB SUBMISSION PARAMETERS
Time: 15:54

User Name: cxm58048
Job Name : ZR13166505
Step Nbr : 1
```

Selection

```
Company: 1      STATE OF ARIZONA
Processing Group:
Process Level:
Department:
Union:
Job Code:
Shift:
Employee: 66504
Employee Group:
Date: 060104 - 070204
Pay Class: RET -or- Pay Codes:
Apply Min or Max: Y
```

Time Record

```
Retro Percent: 2.00 -or- Amount Per Hour:
Retro Pay Code: 144      RETRO PAY
Time Record Date: 072307
```

The Windows taskbar at the bottom shows "Ready", a search bar, and the "Internet" browser icon. The system tray indicates "100%" zoom level.

	HRIS Field	R/O	Step/Action	Expected Results	Additional Information
1	Create CSV File button	R	Click on the Create CSV File display line for the report you would like to view.	The report results will display in an Excel Spreadsheet	
2	View Options drop down	R	Click on View options (drop down menu will display) choose option one of the options.	The report results will display	Depending on the view option selected, you can complete different actions: <ul style="list-style-type: none"> • Text-view results and access HRIS drill around feature. • PDF Landscape-view results and print results to a local printer to save results to your hard drive • XML-view results and access HRIS drill around. Not all computer support XML viewing.

Agency Retroactive Pay Calc (ZR131) – Resubmit Retroactive Job in Update Mode

This is the final step when processing a retroactive pay. This step will rerun the Retroactive job and create the necessary time records to update the Employee's record.

HRIS State of Arizona

Welcome Connie [logout]

Agency Retroactive Pay Calc (ZR131)

Home >> Add Change Delete Previous Inquire Next Inquire Related Forms

2 Submit Reports Job Sched Print Mgr

3 Job Name ZR.13166504

Job Description RETRO FOR EIN 66504

User Name cxm58048 Connie Magallanes

Product Line FUNC803

Parameters

Selection Time Record

Retro Percent 2.00 -or- Amount Per Hour

Retro Pay Code 144 RETRO PAY

Time Record Date 07/23/2003

Distribution Option C

Update Option R 1

Employee Sequence A

	HRIS Field	R/O	Step/Action	Expected Results	Additional Information
1	Update Option field	R	Select an Update Options.	At this step, select appropriate update mode: A – Update: Add Time Records; U – Update: Recreate Time Records .	Retroactive Jobs will always be run twice. The first time in Report Mode, the second time in Update Mode. <i>Update Option Field:</i> <ul style="list-style-type: none"> • Update; Add Time Records: Allows user to add time records to an employee and will not delete any existing retroactive time records. • Update; Recreate Time Records: Allows user to delete retroactive existing time records on an employee record and overwrite with retroactive time records
2	Change button	R	Click Change to update the Retroactive Job		Must click change to store the selection in the Update Option field. Make certain at the bottom of your screen you see “Change Complete Continue” before continuing to the next step.
3	Submit button	R	Click Submit (located under Related Actions)		This submits the job to HRIS to process. To finish submission and view results you will follow the same steps as outlined in the Agency Retroactive Pay Calc (ZR131) – Submit Retroactive Job to Process (Page 8). The only difference is when you click on the second Submit button it will create a time record.