Enroll Employee in General Deduction

Purpose

Deductions in PayServ are either a General Deduction or a Benefit Deduction. For Benefit Deductions to be processed, the Benefit Plan, Plan Details, and Deductions must be defined in configuration setup tables. Currently, PayServ processes the following deductions in a Benefit Plan:

- 457
- Retirement
- ORP
- 403(b) Plans (transitioned from General Deductions to Benefit Plans in 9.2 upgrade)

All other deductions are General Deductions. It is the processing of General Deductions that will be defined in this document.

Helpful Hints

Agency users will continue to only be able to enter General Deductions allowed in the employee's Bargaining Unit.
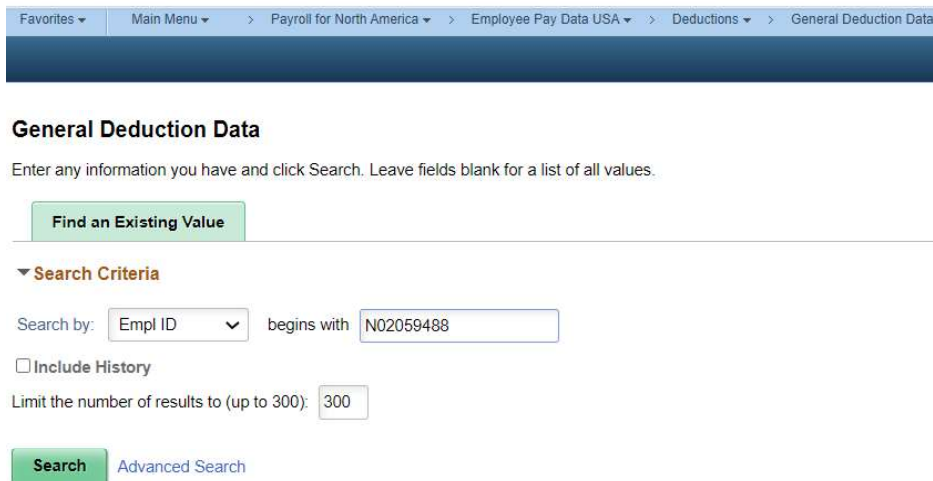
General Deduction Data

Navigation Path

Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > General Deduction Data

Steps

1. Enter the Empl ID and click Search.

2. Add a new Deduction.
   NOTE: When the employee does not have any other General Deductions, you may begin entering the new deduction information. If the employee has other existing General Deduction records, you must first click Add (+ sign) and a blank record will appear.

General Deduction Data

General Deduction

Empl ID   N02059488   NAME,NAME D

Empl Record   0

Primary Empl Record: ☑

Company   NYS   STATE OF NEW YORK

General Deduction	Q	|	◄◄	◄	2 of 9 ∨	►	►►	|	View All

*Deduction Code [Q]   ➕ ➖

Deduction Details	Q	|	◄◄	◄	1 of 1 ∨	►	►►	|	View All

➕ ➖

*Effective Date [10/27/2020] 📅

Calculation Routine [Default to Deduction Table ∨]

Deduction End Date [   ] 📅   Deduction Rate or % [   ]

Goal Amount [   ]   Flat/Addl Amount [   ]

Current Goal Balance [   ]

☐ OSC/Agency Deduction Override

This data was last updated by   Data last updated on

3. Review and/or Enter the following:
   o Displays at the top of the page:
     ▪ EMPL ID and Employee's Name
     ▪ EMPL Record
     ▪ Primary Empl Record Check Box (grayed, for internal processing only)
     ▪ Company
   o Deduction Code: Enter the Deduction Code to be added.
     NOTE: This is a required field. If the Deduction Code entered is not allowed for the employee's Bargaining Unit you cannot save the record. The system uses the Bargaining Unit on the Employee's Job Record, which is located on the Labor Information tab.
   o Effective Date: Enter the correct Effective Date.
     NOTE: This field is required and determines when the deduction will begin.
   o Calculation Routine: This field is required. Select a value from the dropdown list to indicate whether this deduction will be a flat amount, default from the General Deduction Table, or another type of calculation.
   o Deduction End Date: This field is not required. If you want to identify when the deduction will stop, you may enter it at this time.
   o Deduction Rate or %: If appropriate, enter the rate or %.
     NOTE: A rate or % can only be entered if the Calculation Routine has been set to Percentage, Percent of Special Accumulator, or Percent of Total Gross, or if the General Deduction Code has been set to one of these options at the General Deduction Code level.
   o Goal Amount: Optional, enter only if a goal amount should be applied to the deduction.
   o Flat/Additional Amount: If the Calculation Routine has been set to Flat Amount or if the General Deduction Code has been set to Flat Amount at the General Deduction Code level. Enter the amount to be deducted each pay period.
   o Current Goal Balance: This will be set by the system each time a deduction is taken.
     NOTE: You should never enter future effective dated deductions when there is a goal balance. This will cause the deduction to carry forward the current balance and will not include any additional deductions taken before the effective dated pay check.

o When the OSC/Agency Deduction Override applies, it will be displayed only for Agencies.
4. Click Save.

Result
The saved record:

General Deduction

Empl ID N02059488   NAME,NAME D
Empl Record   0
Primary Empl Record: ☐

Company NYS STATE OF NEW YORK

General Deduction	Q | I◄ ◄ 9 of 9 ⌄ ► ►I | View All
*Deduction Code 315 Q State Mutual Life Assur	+ −

Deduction Details	Q | I◄ ◄ 1 of 1 ⌄ ► ►I | View All

+ −

*Effective Date 11/02/2020 📅		
Calculation Routine Flat Amount ⌄		
Deduction End Date 📅	Deduction Rate or %	
Goal Amount $1,000.00	Flat/Addl Amount $80.00	
	Current Goal Balance	

This data was last updated by Online User   Data last updated on 10/27/2020

Additional Information
All edits currently on the pages used to setup a general deduction in 9.1 have been brought forward to the 9.2 system.

Date Reminders:

- To process a general deduction for an employee, the system uses two dates from the Create General Deductions page:
  - Effective Date
  - Deduction End Date (optional)
- If the Effective Date of the deduction is before or on the pay period end date, the system takes the deduction.
- If you specify a Deduction End Date, the system takes the deduction only if the Deduction End Date is after or on the pay period end date.

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