Guided Practice 7

Creating a Payroll Calendar in MyTRS

January 10, 2017

This guide will walk you through the steps of creating payroll calendars within MyTRS.

This guided practice assumes you already know how to:

• Log in to MyTRS

For additional information and troubleshooting please contact your district's assigned ESU representative or EmpSup@trb.state.ma.us



- 1. Log in to MyTRS
- 2. Select "Payroll Calendar" from the home page or from the "Go To" drop down list at the top of the page.
- 3. Under Pay Frequency select the appropriate frequency (e.g., 26 or 21, etc).
- 4. Click Add Calendar button.

| Payroll Calendar | | | | | | |
|------------------|------------------|---------------------|--|--|--|--|
| Pay Frequency: | 26-Bi-Weekly 3 - | | | | | |
| Payroll Period: | | Add Calendar Delete | | | | |
| | | | | | | |
| | Save | Reset | | | | |
| | | | | | | |

- 5. In the Start Date field, enter "01/01/2017."
- 6. In the Stop Date field, enter "12/31/2017."
- 7. Click the **Save** button.

| Payroll Calendar | | | | |
|-----------------------------|-----------------|-----------------|--------------|------------------|
| Pay Frequency: | 26-Bi-Weekly | ▼ | | |
| Payroll Period: | - current | • | Add Calendar | Delete |
| Description: Start Date: | 01/01/2017 5 | * | Stop Date: | 12/31/2017 6 📰 * |
| Provell Coster | | | | |
| Payroll Cycles | | | | |
| Add Pay Date Delete Ge | enerate | | | |
| Sort Olumns Siew Row | Records │ ⊜Prin | t Bexport | | |
| Active Select 🗆 P | ay Date 🛓 | Summer Pay Date | | |
| | | | | |
| | | 7 Save | Reset | |

8. Click the **Generate** button.

| Payroll C | ycles | | | |
|--------------|-------------|-----------------|-----------------|--|
| Add Pay Date | Delete | 8 Generate | | |
| Sort 🖸 | lumns 🔤 iew | Row Becords Ber | int Export | |
| Active | Select 🗌 | Pay Date 🛓 | Summer Pay Date | |
| | | | | |
| | | | Save | |

- 9. In the "First Pay Date" field enter the date of the first check to be issued in Jan 2017.
- 10. Click the **OK** button.

| Payroll Cycles | |
|---------------------|------------------------------|
| Add Pay Date Delete | Generate |
| | Pay Frequency: Bi-Weekly |
| Sort Columns View | 9 First Pay Date: 01/14/2017 |
| Active Select | Second Pay Date: |
| Active Select | Last Pay Date: 12/31/2017 |
| | # of Periods: |
| | 10 OK Cancel |

If you are creating a semi-monthly calendar (20 or 24 semi-monthly) please enter the Second Pay Date information as well. If you are creating a bi-weekly or weekly calendar, leave this field blank.

You should now see the pay calendar for the entire 2017 year.

| Payroll Cycles | | | | | | | | | |
|------------------------------|--|------------|---|-----------------|--|--|--|--|--|
| Add Pay Date Delete Generate | | | | | | | | | |
| | | | | | | | | | |
| Son | Solution Select Select Several Select Several Select Selec | | | | | | | | |
| Active | | Pay Date | | Summer Pay Date | | | | | |
| ٢ | | 01/14/2017 | * | | | | | | |
| 0 | | 01/28/2017 | * | | | | | | |
| 0 | | 02/11/2017 | * | | | | | | |
| 0 | | 02/25/2017 | * | | | | | | |
| 0 | | 03/11/2017 | * | | | | | | |
| 0 | | 03/25/2017 | * | | | | | | |
| 0 | | 04/08/2017 | * | | | | | | |
| 0 | | 04/22/2017 | * | | | | | | |
| 0 | | 05/06/2017 | * | | | | | | |
| 0 | | 05/20/2017 | * | | | | | | |
| \odot | | 06/03/2017 | * | | | | | | |
| 0 | | 06/17/2017 | * | | | | | | |
| \odot | | 07/01/2017 | * | | | | | | |
| 0 | | 07/15/2017 | * | | | | | | |
| 0 | | 07/29/2017 | * | | | | | | |
| 0 | | 08/12/2017 | * | | | | | | |
| | | 08/26/2017 | * | | | | | | |
| 0 | | 09/09/2017 | * | | | | | | |
| 0 | | 09/23/2017 | * | | | | | | |
| 0 | | 10/07/2017 | * | | | | | | |
| 0 | | 10/21/2017 | * | | | | | | |
| 0 | | 11/04/2017 | * | | | | | | |
| 0 | | 11/18/2017 | * | | | | | | |
| \odot | | 12/02/2017 | * | | | | | | |
| \odot | | 12/16/2017 | * | | | | | | |
| ۲ | | 12/30/2017 | * | | | | | | |
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| | | | | Save Rese | | | | | |

11. If you have employees who receive a lump sum payment at the end of June, please check the "Summer Pay Date" check box to the right of the pay dates on which they will *not* receive a pay check during the summer.

| Payroll Cycles | | | | | |
|----------------|-------|----------------|---------------|------------|------------|
| Add Pay | Date | Delete Gene | erate | | |
| Sort | Colur | mns 🔤 view Row | t≣Records € | Print | |
| Active | Selec | t Pay Date 🛓 | | Summer Pay | Date |
| 0 | | 01/05/2017 | * | | |
| 0 | | 01/19/2017 | * | | |
| \odot | | 02/02/2017 | * | | |
| \odot | | 02/16/2017 | * | | |
| \odot | | 03/02/2017 | * | | |
| \odot | | 03/16/2017 | * | | |
| \bigcirc | | 03/30/2017 | * | | |
| \odot | | 04/13/2017 | * | | |
| \odot | | 04/27/2017 | * | | |
| \odot | | 05/11/2017 | * | | |
| \odot | | 05/25/2017 | * | | |
| \odot | | 06/08/2017 | * | | |
| \odot | | 06/22/2017 | * | | |
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| \odot | | 08/31/2017 | * | | |
| \odot | | 09/14/2017 | * | | |
| \odot | | 09/28/2017 | * | | |
| \odot | | 10/12/2017 | * | | |
| \odot | | 10/26/2017 | * | | |
| \odot | | 11/09/2017 | * | | |
| \odot | | 11/24/2017 | * | | |
| \odot | | 12/07/2017 | * | | |
| ۲ | | 12/21/2017 | * | | |
| | | | | | |
| | | | | - | |
| | | | | | Save Reset |

- 12. If, however, you are creating a **21 or 22** pay calendar, you will need to <u>delete</u> the dates for which employees will not receive a paycheck.
 - a. Click the Select boxes to the <u>left</u> of the summer dates for which someone on a 21 or 22 pay cycle will not receive a check.
 - b. Click the **Delete** button above the calendar.

| Payroll Cycles 12b | | | | | | | | |
|------------------------------|---|------------|-----|-----------------|-------|--|--|--|
| Add Pay Date Delete Generate | | | | | | | | |
| ^A z Sort | Sort Columns Wiew Row Records Print Proof | | | | | | | |
| Active | Select | Pay Date | | Summer Pay Date | | | | |
| ٢ | | 01/14/2017 | *** | | | | | |
| 0 | | 01/28/2017 | * | | | | | |
| 0 | | 02/11/2017 | * | | | | | |
| 0 | | 02/25/2017 | * | | | | | |
| 0 | | 03/11/2017 | * | | | | | |
| 0 | | 03/25/2017 | * | | | | | |
| 0 | | 04/08/2017 | * | | | | | |
| ۲ | | 04/22/2017 | * | | | | | |
| 0 | | 05/06/2017 | * | | | | | |
| ۲ | | 05/20/2017 | * | | | | | |
| ۲ | | 06/03/2017 | * | | | | | |
| \bigcirc | | 06/17/2017 | * | | | | | |
| \bigcirc | V | 07/01/2017 | * | | | | | |
| 12a | V | 07/15/2017 | * | | | | | |
| 0 | V | 07/29/2017 | * | | | | | |
| \odot | V | 08/12/2017 | * | | | | | |
| \odot | | 08/26/2017 | * | | | | | |
| 0 | | 09/09/2017 | * | | | | | |
| \odot | | 09/23/2017 | * | | | | | |
| 0 | | 10/07/2017 | * | | | | | |
| 0 | | 10/21/2017 | * | | | | | |
| 0 | | 11/04/2017 | * | | | | | |
| 0 | | 11/18/2017 | * | | | | | |
| 0 | | 12/02/2017 | * | | | | | |
| 0 | | 12/16/2017 | * | | | | | |
| 0 | | 12/30/2017 | * | | | | | |
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| | | | | | | | | |
| | | | | Save | Reset | | | |

13. Click Save.

Notes:

- If you offer 26 pays, 21 pays and 52 pays, you will need to create a separate calendar for each one.
- After you have created the first calendar, choose the next Pay Frequency from the list <u>BEFORE</u> clicking Add Calendar. If you do not click the new Pay Frequency first, you will overwrite the calendar you just created.