



Payroll Union Setup

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Union Set up

Unions can accommodate a wide variety of tracking and reporting requirements. The union represents the various trades your company works with. Within each union are union locals, and within each local are union classes, e.g., journeyman or apprentice.

Union classes can efficiently trigger the appropriate pays, deductions, and fringes associated with earnings entered for a union class. Information can be maintained in one place for the union, rather than for each employee. For example, if a union deduction changes, change the deduction amount once in the Union Class Setup window instead of changing it for every employee. The deduction is then correctly calculated for all employees who are assigned to that union.

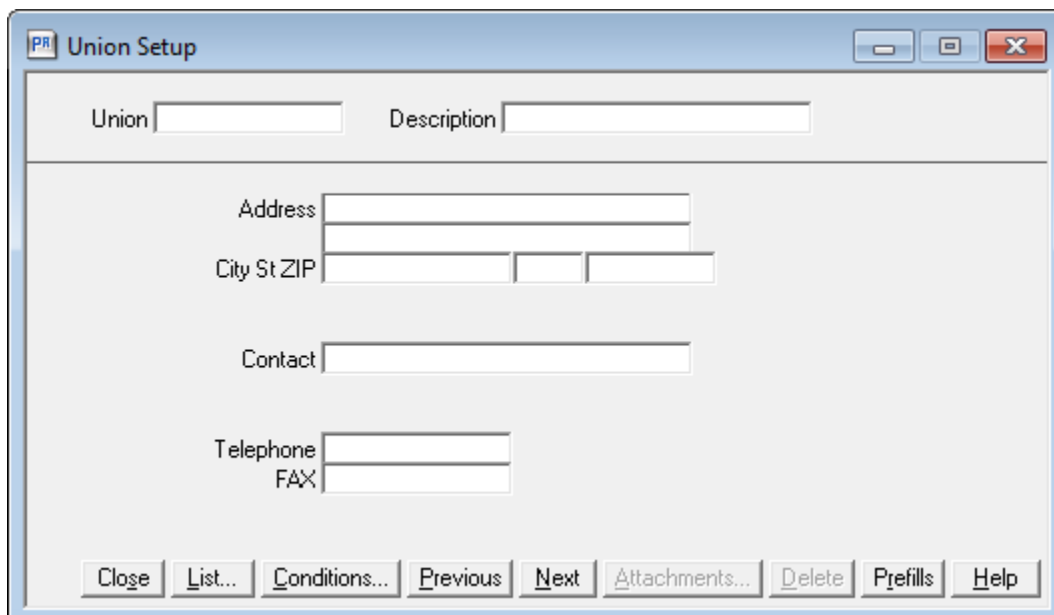
When checks are processed, the appropriate pays, deductions, and fringes set up for the union class are automatically calculated and stored with the appropriate union, local, and class for union reporting.

Tips and Tricks

Prior to setting up Unions have your other pays, fringes, and deductions that will be used by the union's setup. Know your union contracts for items of pay, deductions and fringes

Union Setup

1. From the Setup menu, select **Unions, Locals**.





2. Enter a union ID, description, and other information for the union.

The 'Union Setup' dialog box contains the following fields and buttons:

- Union:
- Description:
- Address:
- City St ZIP:
- Contact:
- Telephone:
- FAX:
- Buttons: Save, Cancel, List..., Attachments..., Delete, Local... (circled in red), Help

3. Click [**Local**], enter a local ID, description, and other information for each local associated with the union.

The 'Union Local Setup' dialog box contains the following fields and buttons:

- Union:
- Local:
- Desc:
- Desc:
- Address:
- City St ZIP:
- Contact:
- Telephone:
- FAX:
- Effective date:
- Good-thru date:
- Buttons: Accept, Cancel, Delete, Class... (circled in red), Help



- Click **[Class]**, enter a class ID, and description for a class associated with the union local.

Union	CARP	Desc	Carpenter's Union
Local	101	Desc	Local 101
Class	J	Desc	Journeyman

Type	Item	Calc Method	Amount
Pay	U_VAC	Default	1.13000
Deduct	DUES	Default	8.00000
Fringe	EDC	Default	.12000
Fringe	H&W	Default	1.53000
Fringe	PEN	Default	1.49000
Pay		Default	

- Enter a line of detail for each pay, deduction, and fringe specific to this union class. Click **[Accept line]** after entering each line.
- Click **[Accept]**, **[Close]**, and **[Save]** until you have exited from union setup.



7. If an employee consistently works in the same union, union local, and union class, select Employees from the Setup menu and on the Entry Info tab, assign the Union, Union local, and Union class.

The screenshot shows the 'Employee Setup' dialog box with the 'Entry Info' tab selected. The 'Employee' field contains '101' and the 'Name' field contains 'Jones; Robert E'. The 'Entry Info' tab is active, showing various fields for employee information. The 'Union', 'Union local', and 'Union class' fields are circled in red. The 'Union' field contains 'C&G', 'Union local' contains '320', and 'Union class' contains '0'. Other fields include 'Residence State' (OR), 'Work State' (OR), 'WC state' (OR), 'Filing status' (M), 'Personal exemptions' (4), 'Pay ID' (REG), 'Job', 'JC Cost Code', 'Equipment', 'EQ cost code', 'Department', 'Certified class' (EQOP), 'Shift', 'Misc 1', and 'Misc 2'. There are also buttons for 'Pays', 'Deducts', 'Eringes', 'Taxes', and 'State'.

8. If the union local your employees report to changes based on the jobs they work on, consider using Job Local Tables to help automate the entry of earnings information. See below

Note: Rate retrieval for regular and overtime pays cannot be performed from the union class table. These types of pays should be based on a pay rate table using Other Tables, Pay Rate Tables. Also, workers' compensation fringes cannot be entered for a union class.



Job Local Setup

Use to set up tables that match jobs with the appropriate union local for each union represented in your work force

Set up job local tables to match jobs with the appropriate union local. When an employee moves from one job to the next, the employee might also move from one union local to another. Job local tables help make sure that the appropriate union local IDs are assigned to earnings as they are entered. The number of tables you set up depends on how many unions are represented in your company. If you set up a job local table, as you enter employee earnings, the correct local prefills according to the job and union you enter. When a job and union are entered for employee earnings in Enter Time or Enter Checks, the union local ID prefills first from the job local table. If a job local table is not set up for a union, union local information prefills from the Employee Setup window (Entry Info tab).

1. From the Setup menu, select Unions, Job Local Tables.

Job	Job Description	Union Local	Local Description

2. Select a union ID from the list of unions you have set up.



3. Select a job ID from the list of jobs, or enter a new job ID. If you are using a new job ID, enter the information for this job in the Add New Job window.
4. Select a union local ID from the list of union locals. When entering time or checks, union local information prefills first from the job local table. If a job local table is not set up for a union, union local information prefills from the Employee Setup window (Entry Info tab).
5. Repeat steps 3 and 4 for each job that you want to associate with a union local.

Job	Job Description	Union Local	Local Description
01-001		101	Local 101
01-002		101	Local 101
01-003		101	Local 101

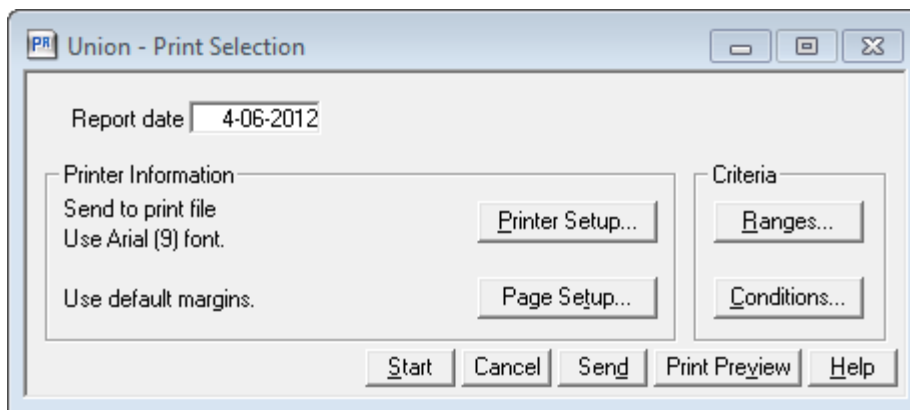
6. Click [**Accept Table**].
7. Click [**Close**].

Notes Although you can use the Add New Job window to add jobs to Job Cost as you set up a job local table, the setup process is faster if the appropriate jobs have been set up before you set up a job local table.



Tips and Tricks:

To easily view your union setup in payroll go to Reports > Setup > Union



Use Ranges and/or Conditions to limit the records returned on the report

This report gives you a nice, clean view of your union setup and should be used to verify setup after the initial effort and after you change things.

About rate changes in the middle of a pay period

If union, pay, tax, deduction, fringe, or workers' compensation rates or calculation methods change in the middle of a pay period, print two checks for the employee for that pay period to compensate for the rate change. The first check amount is calculated based on the old rates and calculation methods, and the second check amount is calculated based on the new rates.

For example, if workers' compensation rates change mid-pay period, the following steps are necessary.

1. Enter and process a check for the affected employees as you would during a normal pay period, using a Check sequence of First.
2. Change the workers' compensation rates to the new amounts in the Fringe Setup - Workers' Comp Table window.



3. Enter and process another check for the affected employee for the current pay period, using a Check sequence of Second. Print both checks during your normal Payroll workflow.

This process is similar to entering multiple checks for an employee in a single pay period; however, before the second check is entered, the appropriate rate or calculation method change must be made.



THANK YOU!

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