



Recurring Pay Deductions

Overview

An HR Professional or an employee can request to have an amount deducted from an employee's warrant every pay period for a specific period of time for many purposes, including making recurring payments for certain types of insurance premiums and charitable donations.

Only A & H Roles can perform this activity for employees.

Guidelines

The following guidelines apply to recurring pay deductions.

- State Group Insurance deductions are processed through the Health and Insurance tab in the People First System.
 - Deductions will continue to be taken unless there is an end date specified.
 - Additional documentation and/or approvals may be required for certain types of deduction.
 - The following deductions are system calculated post-tax deductions. No amount or percentage should be entered for these types of recurring deductions.
 - 262
 - 621
 - 627
 - 672
 - 676
-

Key Activities

The following activities will be covered in this section of the Pay Information User Guide

Key Activity	Page
Accessing The Screen	3
Starting A Recurring Deduction	4
Stopping A Recurring Deduction	6

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Recurring Pay Deductions, Continued

Recurring Pay Deduction Screen

This section contains the employee's personal information.

Recurring Pay Deductions

Employee ID #: |

Title: Agency:

This section provides information on all deductions.

Recurring Pay Deductions->Overview

Wage Type	Wage Type Text	Effective date	End Date	Amount	Number	Unit
<input checked="" type="radio"/> 0232	P&C SELECT D/B/A CAPITAL	06/01/2005	12/31/9999	72.59		
<input type="radio"/> 0490	FLORIDA COMMERCE CREDIT U	06/01/2005	12/31/9999	500.00		
<input type="radio"/> 0232	P&C SELECT D/B/A CAPITAL	05/01/2005	05/31/2005	331.24		

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This section provides the details of the deduction.

Recurring Pay Deductions->Details

Type: * P&C SELECT D/B/A CAPITAL

Start date: *

End Date: *

Amount:

Number/Unit:

Key Fields

The following table provides details on the key fields found on the Recurring Deduction screen.

Key Field	Description
Type	Indicates which wage type (e.g. insurance premiums, Employee reimbursements) is being deducted from the Employee's pay.
Start Date	Indicates when the recurring pay deduction will become effective.
End Date	Indicates when the recurring pay deduction will end (defaults to 12/31/9999).
Amount	Indicates how much in U.S. dollars should be deducted from the Employee's warrant for this recurring pay deduction. Type dictates when to use this field and/or the Number/Unit field.
Number/Unit	Indicates how much in hours, percentage, or multiples should be deducted. Type dictates when to use this field and/or the Amount field.

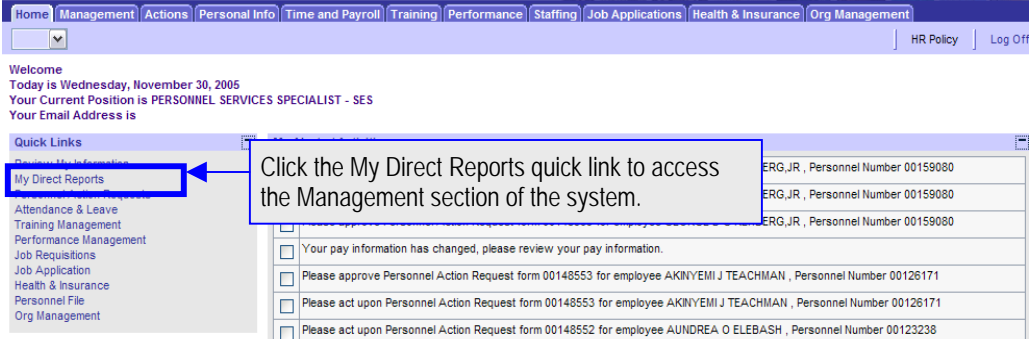
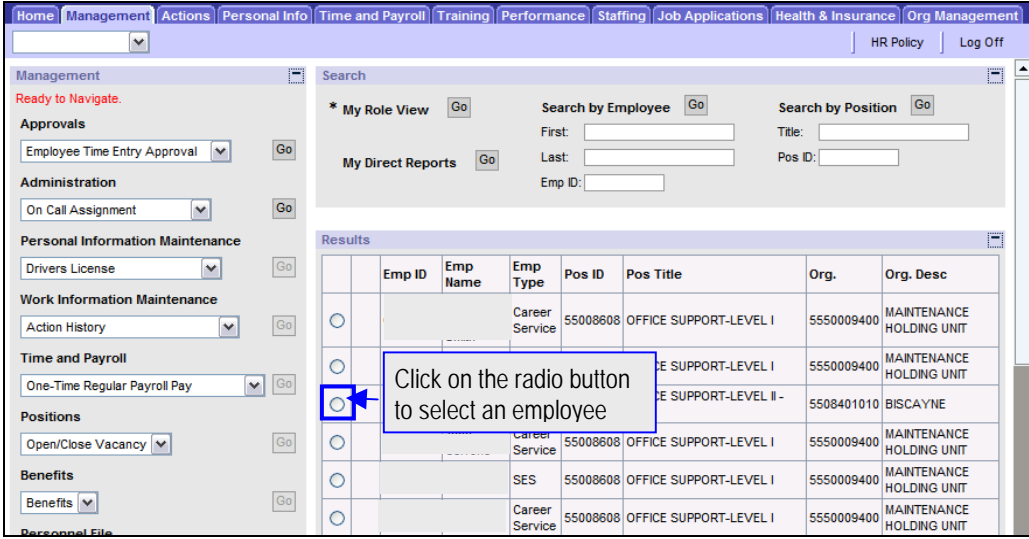
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Recurring Pay Deductions, Continued

Accessing The Screen

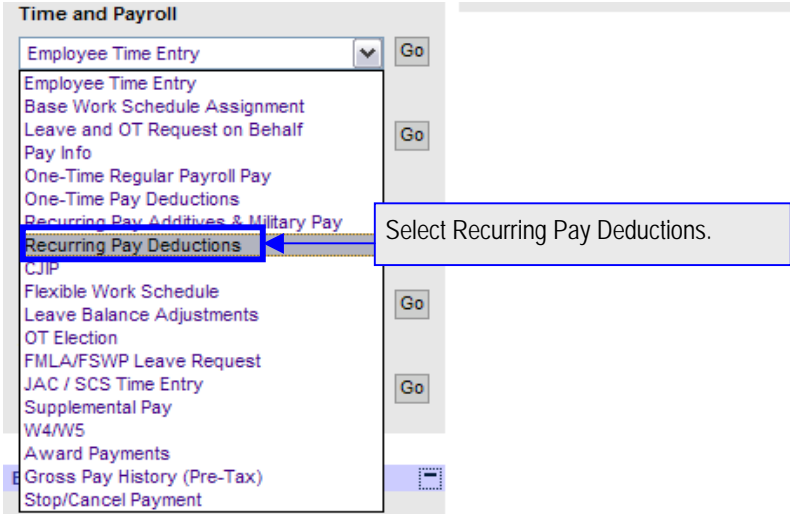
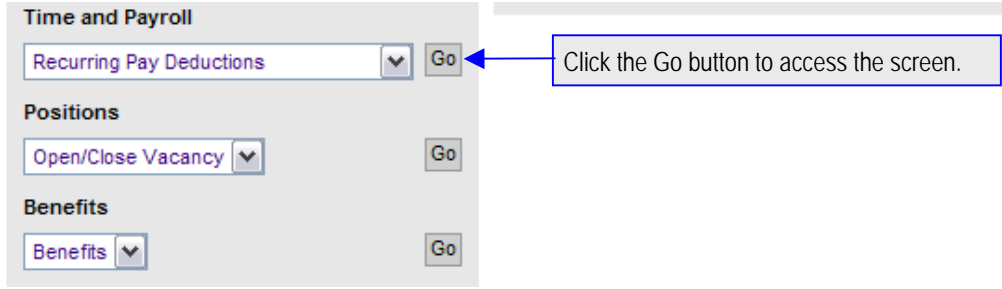
Follow the steps below to access the Regular Pay Deductions screen.

Step	Action
1	<p>Click on the My Direct Reports link from the Quick Links list on the People First Home Page. The Management Menu screen will be displayed.</p>  <p>NOTE: For information on logging in to the People First system, refer to the Navigating the People First Web Site User Guide located in the On-Line Training Tool.</p>
2	<p>Click the radio button (circle) to the left of the employee's information on the Management menu to select the employee.</p>  <p>NOTE: If there is no Employee Name or Employee ID, then the position is vacant. While you still maintain this position, no one currently holds it.</p>

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Recurring Pay Deductions, Continued

Step	Action
3	<p>Select Recurring Pay Deductions from the Time and Payroll drop down menu, by clicking the Go button.</p> 
4	<p>Click the Go button. The Recurring Pay Deductions screen will be displayed.</p> 

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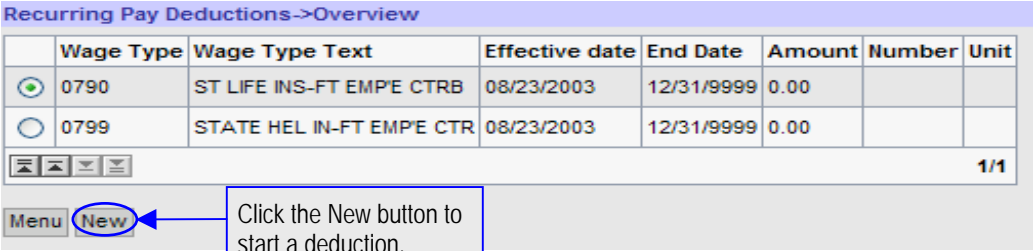
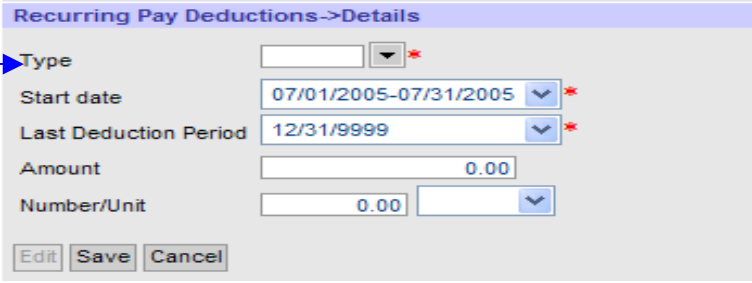
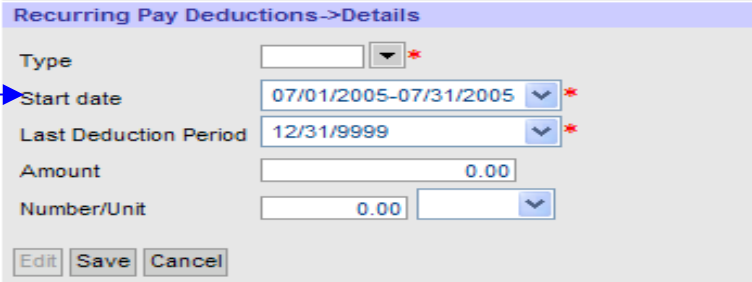


Recurring Pay Deductions, Continued

Starting A Recurring Pay Deduction

Follow the steps below to start a Recurring Pay Deduction.

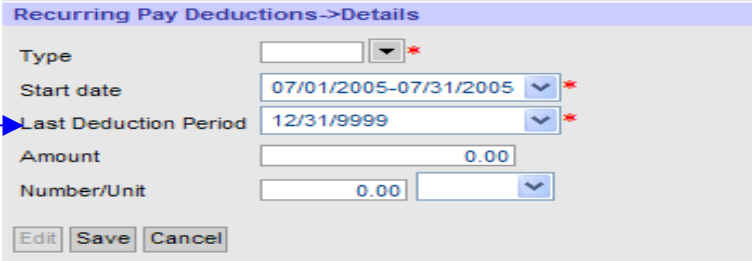
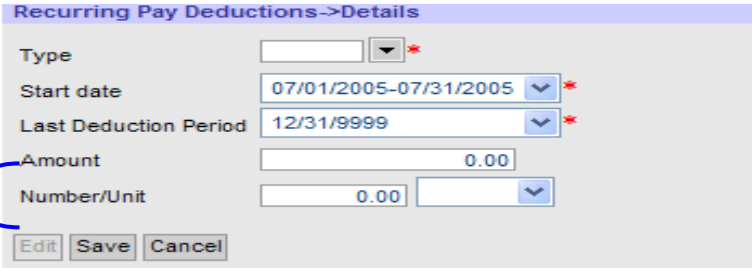
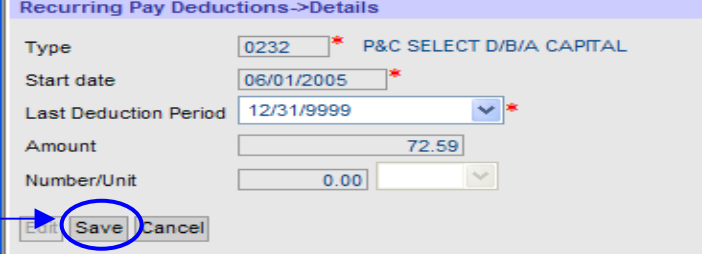
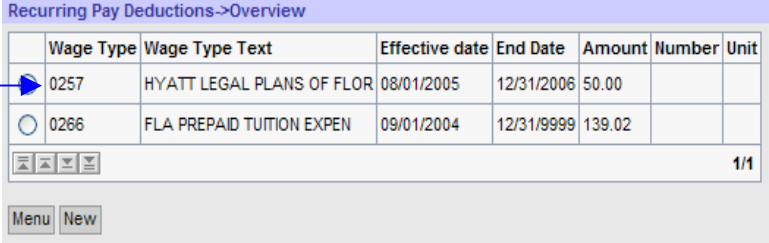
NOTE: Refer to the Accessing The Screen procedures on the previous pages for information on how to navigate to this screen. To change a deduction amount, a new deduction for the same type must be created. The People First system will automatically end date the previous deduction.

Step	Action
1	<p>Click on the New button in the Overview box to display the Details box with the fields "open" for editing.</p>  <p>NOTE: If a payment has never been processed for this employee, the Details box will display automatically. Click on the Edit button in the Details box. The fields on the screen will "open" to allow for editing.</p>
2	<p>Select the desired Wage Type from the Type drop down menu for the deduction being requested.</p> 
3	<p>Select the Pay Period in which the deduction is to start from the Start Date drop down menu.</p>  <p>NOTE: Only those pay periods still available will be displayed.</p>

Continued on next page



Recurring Pay Deductions, Continued

Step	Action																					
4	<p>Select the Pay Period in which the last deduction is to occur from the Last Deduction Period drop down menu.</p> <div data-bbox="500 516 740 642" style="border: 1px solid blue; padding: 5px; width: fit-content;"> <p>Select the pay period the deduction is to stop.</p> </div>  <p>NOTE: If no pay period is selected, the People First System will automatically populate this field with a 12/31/9999 date. Only those pay periods still available will be displayed.</p>																					
5	<p>Enter the Amount OR Percentage in the appropriate field.</p> <div data-bbox="509 968 750 1087" style="border: 1px solid blue; padding: 5px; width: fit-content;"> <p>Enter the amount or percentage in the appropriate field.</p> </div>  <p>NOTE: Do not enter a deduction amount or percentage when processing one of the system calculated post-tax deductions (262, 621, 627, 672, 676).</p>																					
6	<p>Click on the Save button. The request will be saved.</p> <div data-bbox="509 1402 750 1482" style="border: 1px solid blue; padding: 5px; width: fit-content;"> <p>Click on the Save button.</p> </div> 																					
7	<p>Verify the accuracy of the deduction request in the Overview box.</p> <div data-bbox="487 1608 727 1734" style="border: 1px solid blue; padding: 5px; width: fit-content;"> <p>Verify the deduction information for accuracy.</p> </div>  <table border="1" data-bbox="764 1608 1528 1755"> <thead> <tr> <th>Wage Type</th> <th>Wage Type Text</th> <th>Effective date</th> <th>End Date</th> <th>Amount</th> <th>Number</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>0257</td> <td>HYATT LEGAL PLANS OF FLOR</td> <td>08/01/2005</td> <td>12/31/2006</td> <td>50.00</td> <td></td> <td></td> </tr> <tr> <td>0266</td> <td>FLA PREPAID TUITION EXPEN</td> <td>09/01/2004</td> <td>12/31/9999</td> <td>139.02</td> <td></td> <td></td> </tr> </tbody> </table>	Wage Type	Wage Type Text	Effective date	End Date	Amount	Number	Unit	0257	HYATT LEGAL PLANS OF FLOR	08/01/2005	12/31/2006	50.00			0266	FLA PREPAID TUITION EXPEN	09/01/2004	12/31/9999	139.02		
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Recurring Pay Deductions, Continued

Stopping A Recurring Pay Deduction

Follow the steps below to stop a Recurring Pay Deduction.

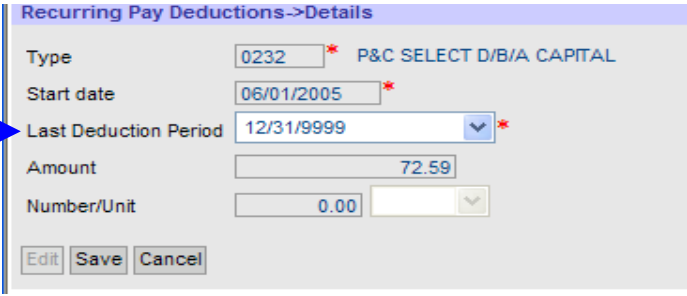
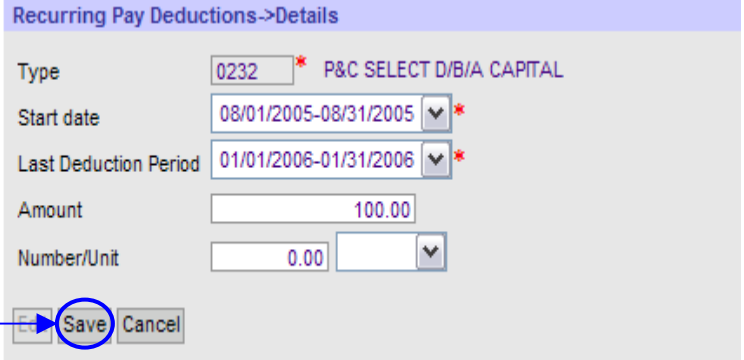
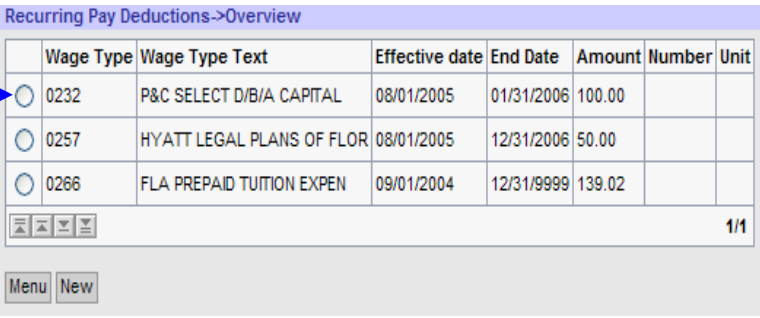
NOTE: Refer to the Accessing The Screen procedures on the previous pages for information on how to navigate to this screen.

Step	Action																												
1	<p>Click on the radio button to the left of the payment to be changed in the Overview box. The specifics of that deduction will display in the Details box.</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid blue; padding: 5px; margin-bottom: 10px;">Click on the radio button to select the payment</div> <div style="border: 1px solid gray; padding: 5px;"> <p>Recurring Pay Deductions->Overview</p> <table border="1"> <thead> <tr> <th>Wage Type</th> <th>Wage Type Text</th> <th>Effective date</th> <th>End Date</th> <th>Amount</th> <th>Number</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> 0232</td> <td>P&C SELECT D/B/A CAPITAL</td> <td>06/01/2005</td> <td>12/31/9999</td> <td>72.59</td> <td></td> <td></td> </tr> <tr> <td><input type="radio"/> 0490</td> <td>FLORIDA COMMERCE CREDIT U</td> <td>06/01/2005</td> <td>12/31/9999</td> <td>500.00</td> <td></td> <td></td> </tr> <tr> <td><input type="radio"/> 0232</td> <td>P&C SELECT D/B/A CAPITAL</td> <td>05/01/2005</td> <td>05/31/2005</td> <td>331.24</td> <td></td> <td></td> </tr> </tbody> </table> <p>Menu New</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid blue; padding: 5px;">The details are displayed here</div> <div style="border: 1px solid gray; padding: 5px;"> <p>Recurring Pay Deductions->Details</p> <p>Type <input type="text" value="0232"/> * P&C SELECT D/B/A CAPITAL</p> <p>Start date <input type="text" value="06/01/2005"/> *</p> <p>End Date <input type="text" value="12/31/9999"/> *</p> <p>Amount <input type="text" value="72.59"/></p> <p>Number/Unit <input type="text" value="0.00"/> <input type="text"/></p> <p>Edit Save Cancel</p> </div> </div>	Wage Type	Wage Type Text	Effective date	End Date	Amount	Number	Unit	<input checked="" type="radio"/> 0232	P&C SELECT D/B/A CAPITAL	06/01/2005	12/31/9999	72.59			<input type="radio"/> 0490	FLORIDA COMMERCE CREDIT U	06/01/2005	12/31/9999	500.00			<input type="radio"/> 0232	P&C SELECT D/B/A CAPITAL	05/01/2005	05/31/2005	331.24		
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2	<p>Click on the Edit button in the Overview box to display the Details box. The fields will "open" for editing.</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Recurring Pay Deductions->Details</p> <p>Type <input type="text" value="0232"/> * P&C SELECT D/B/A CAPITAL</p> <p>Start date <input type="text" value="06/01/2005"/> *</p> <p>End Date <input type="text" value="12/31/9999"/> *</p> <p>Amount <input type="text" value="72.59"/></p> <p>Number/Unit <input type="text" value="0.00"/> <input type="text"/></p> <p>Edit Save Cancel</p> </div> <div style="border: 1px solid blue; padding: 5px; margin-top: 5px;">Click the Edit button to stop a deduction.</div>																												

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Recurring Pay Deductions, Continued

Step	Action																												
3	<p>Select the Pay Period in which the last deduction is to be taken from the Last Deduction Period drop down menu. To stop an existing deduction from being taken out of the current pay period, select the prior pay period in the “Last Deduction Period” drop down menu.</p> <div data-bbox="495 598 750 693" style="border: 1px solid blue; padding: 5px; display: inline-block;"> Select the last deduction pay period. </div>  <p>NOTE: Only those pay periods still available will be displayed.</p>																												
4	<p>Click on the Save button. The requested change will be saved.</p> <div data-bbox="511 1186 750 1270" style="border: 1px solid blue; padding: 5px; display: inline-block;"> Click on the Save button. </div>  <p>NOTE: The date placed in the “Last Deduction Period” field indicates the last pay cycle the deduction will be taken.</p>																												
5	<p>Verify the accuracy of the deduction request in the Overview box.</p> <div data-bbox="495 1459 738 1585" style="border: 1px solid blue; padding: 5px; display: inline-block;"> Verify the deduction information for accuracy. </div>  <table border="1" data-bbox="771 1407 1526 1722"> <thead> <tr> <th>Wage Type</th> <th>Wage Type Text</th> <th>Effective date</th> <th>End Date</th> <th>Amount</th> <th>Number</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>0232</td> <td>P&C SELECT D/B/A CAPITAL</td> <td>08/01/2005</td> <td>01/31/2006</td> <td>100.00</td> <td></td> <td></td> </tr> <tr> <td>0257</td> <td>HYATT LEGAL PLANS OF FLOR</td> <td>08/01/2005</td> <td>12/31/2006</td> <td>50.00</td> <td></td> <td></td> </tr> <tr> <td>0266</td> <td>FLA PREPAID TUITION EXPEN</td> <td>09/01/2004</td> <td>12/31/9999</td> <td>139.02</td> <td></td> <td></td> </tr> </tbody> </table>	Wage Type	Wage Type Text	Effective date	End Date	Amount	Number	Unit	0232	P&C SELECT D/B/A CAPITAL	08/01/2005	01/31/2006	100.00			0257	HYATT LEGAL PLANS OF FLOR	08/01/2005	12/31/2006	50.00			0266	FLA PREPAID TUITION EXPEN	09/01/2004	12/31/9999	139.02		
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