



# USPS-R Payroll Item Mass Load

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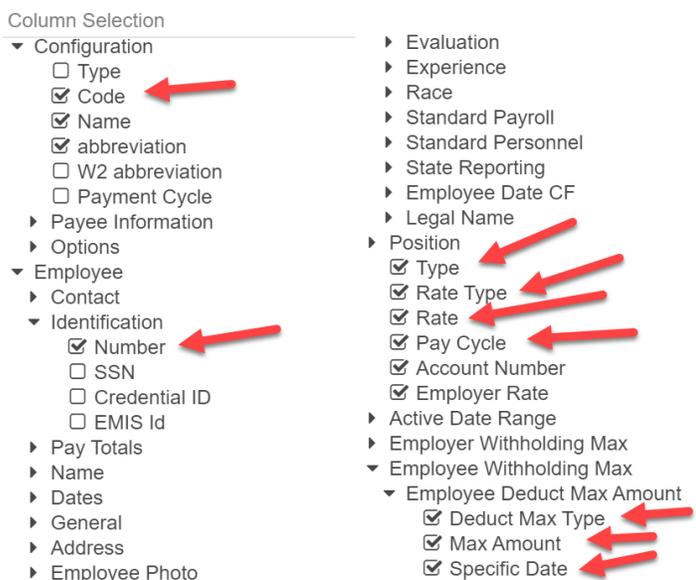
In Redesign, Mass Load is a way to make changes to existing information or to add certain records in the database. This method is more efficient than manually editing or creating each individual record one by one. Districts can use Mass Load when updating annual Union Dues, Annuities, or HSA payroll items, since those rates may change each year. Furthermore, Mass Load is commonly used to update Max Amount information annually.

## Create a CSV

In order to use Mass Load, a CSV file must be created. This is the only acceptable file type. This file can typically be created from a grid and modified before using Mass Load.

1. Go to Core>Payroll Item>Payroll Item
2. Choose the appropriate selection from the "Select Payroll Item" drop box at the upper-left corner of the grid. This ensures availability to all necessary fields for each record.
  - Union Dues or Garnishments = Regular Item
  - Annuities = Annuity Item
  - HSA = Health Savings Account Item
3. Using the "More" button, add all fields to the grid needed to update/create the payroll item record. Only Employee Number and Code (also Position Number if the item is by job) are mandatory fields for the mass change to work. A listing of all optional fields can be found [here](#).

For example, when updating/creating Union Dues, include the following fields on your grid: "Employee #", "Code", "Type", "Name", "Rate Type", "Rate", "Pay Cycle", "Employee Deduct Max Type", "Employee Max Amount", & "Employee Specific Date". Use the More button to add the fields as necessary (see the picture below).



4. Exit the More screen after making your selections. You will need to choose the appropriate selection again from the Payroll Item drop box (i.e. "Regular Item") in the upper left corner.
5. Type the desired "Code" to filter your grid on a specific Payroll Item Code.
6. Click the Report button at the top of the grid.
7. In Report Options, choose "Excel-FieldNames" as the Report Type (you will need to click the mini down arrow in the lower right to scroll to find the Excel-FieldNames option), then Generate Report. Choosing "Excel-FieldNames" will create a spreadsheet with column headings needed to Mass Load the file back into the database.

Report Options

Format:

Page Size:

Orientation:

Name:

8. In Excel, make the changes to the necessary fields, for example:
  - "rate" (total monthly rate)
  - "employeeDeductMaxAmount.deductMaxType" (will typically be SpecificDate)
  - "employeeDeductMaxAmount.maxAmount" (total of the union dues for the year)
  - "employeeDeductMaxAmount.specificDate" (the pay date of the payroll that the withholding will start).
  - **All 3 of the max fields must be populated for the max amounts to calculate correctly.**
 If adding new records, add new rows and populate information in all necessary columns.
9. Remove any unnecessary rows (for example, if an employee has a Stop Date) and columns (for example, any "employer" related fields are not used) that will not be re-imported. ("employee.number" & "configuration.code" are mandatory fields, so do not delete)
 

**\*Note: If updating the Employee Max Amount fields, remove the Employer Max Amount fields from the file. Also, if updating the Employer Max Amount fields, remove the Employee Max Amount fields from the file. Otherwise, the Mass Load will result in error.**
10. Save your file as a CSV.

## Mass Load the CSV into Redesign

11. In Redesign, go to Utilities>Mass Load
12. Click  and select the CSV file previously saved.
13. Choose PayrollItem from the Importable Entities drop box
 

Importable Entities:
14. Click . Review the message to ensure there are no Errors. If there are errors, review the USPSLOADERR file, correct the error(s) on the CSV and re-load.