USPS-R New Contract Checklist

Please contact your ITC for complete instructions before using this Checklist
Provided below is a checklist that can be used to assist in the New Contract creation process

1. ____ Make sure that **Job Calendars** for the new fiscal year are created in order for new contracts to calculate pay information and days accurately.
2. ____ Go to **Processing > New Contracts**. One of three options can be used to create new contracts. Whichever option is used make sure there are **Compensation Start and Compensation Stop dates** defined.
    a. **Mass Copy Compensations:** Similar to **BUILD** in Classic **NEWCNT**. This option allows you to **Include Concealed Employees** if desired.
        - If you want to **Include Compensations** that are only active from a particular date, you would choose or enter the date in the box provided.
        - You can then select the **Pay Group(s)** you wish to build the compensations for. You will need to enter in a **Contract Start Date** and a **Contract Stop Date**.
        - Click on the **Build New Contracts** button.
    b. **Import New Contracts:** Similar to **IMPORT** in Classic **NEWCNT**. This feature will allow a correctly formatted CSV file to be imported with new contract information.
        - If you have an existing spreadsheet, in order for the Import option to properly build new contract records, the data columns must contain the appropriate heading information in row one. These headings must match what is defined in the New Contracts chapter in the USPS-R User Manual in order for the Import program to recognize and load the data**.**
        Note Please be aware that the header columns are case sensitive.
        - There are four required fields on the new contract CSV file: **employeeId**, **jobNo**, **contractType and compensationLabel.** Label is only required if the employee has more than one Compensation for a Position. The remainder of the data available is optional and will be dependent upon the contract type being imported.
        - A spreadsheet can also be created using the **Compensation** view and selecting the appropriate fields from the grid. Choosing the **Format-Excel-FieldNames** will create an Excel type file. The user should update the obligation/amount and header information, also add the header-contractType and add NewContract in that column for all employees and then save the file as a CSV file.
    c. **New Contract Maintenance:** Similar to the **MAINT** option in Classic. This will allow you to create a single employee's New Contract. This option is best used when creating a mid year contract change.
3. ____ **New Contract Reports**
    a. A **New Contract Report** can be run by going to **Reports>New Contract Report**. This will show all new contract information created.

      b. The **SSDT New Contract Summary Report** can be found under **Reports>Report Manager>SSDT New Contract Summary Report.** This report will show a summary of the new contract data for each employee.

      c. **SSDT New Contract Payroll Accounts Report** can be run by going to **Reports>Report Manager>SSDT New Contract Payroll Accounts Report.** This report will only list any new expenditure account information that was added or imported into the new contract screen.

      d. A report can also be created on the **New Contact Grid** by filtering the Pay Group **Code** for specific pay group(s) and then choosing the properties such as **Number, Last name, First Name, Code, Position, Label, Contract Obligation** and **Contract Amount**. The report will total the **Contract Obligation** and **Contract Amounts** for balancing purposes before new contract activating is performed.

4. ____ **Non Contract Compensations** can be created by going to **Reports>Report Manager** and generating the **SSDT Non Contract Compensation Mass Load Extract.** The data in the file should be manually updated and then saved as a CSV file.

      a. You can then go to **Utilities>Mass Load> Compensation** and load the **Non Contract Compensation** data.

5. ____ In **Processing>New Contracts,** the **Activate** process can be run at any time because of the use of **Compensation Start and Compensation Stop Dates**.