
UNITED WAY DEDUCTIONS (PAY-W014)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to set up an employee with a miscellaneous deduction for United Way.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Lead Payroll Technician
- 2.2 Fiscal Services Technician I

3.0 APPROVAL AUTHORITY:

- 3.1 Supervisor IV, Payroll Services

Authorized Signature on File

4.0 DEFINITIONS:

- 4.1 United Way deductions are voluntary contributions that are taken once per month from January through December.

5.0 WORK INSTRUCTION:

- 5.1 Sign into Escape, selecting the Payroll module.
- 5.2 Search for an employee by last name hitting <F9> or by SSN hitting <F10> and hit <Enter> to select the employee.
- 5.3 Hit <Enter> to go into employee's detail screen.
- 5.4 Hit <Ctrl P> to go into the employee's payroll set up records screen.
- 5.5 First check to see if an employee has a deduction for United Way set up.
- 5.6 Hit <Alt A> to bring up the add-on window.
- 5.7 Select 'Miscellaneous deduction.'
- 5.8 Enter effective begin date and end date. This is always January 1 through December 31 of the coming year.
- 5.9 In the GTN field, enter UNITED W.
- 5.10 In the amount field, enter in the dollar amount to be deducted per pay period.
- 5.11 Hit F3 to save.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 United Way Donation form

UNITED WAY DEDUCTIONS (PAY-W014)

Sacramento City Unified School District

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
United Way donation form	File cabinet in office	Two years, current and previous fiscal year. After two years, sent to warehouse.	None. Must keep all payroll records per Internal Audit Department.	Access with approval of Payroll Services Department.

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/14/04	A	Initial Release
3/5/07	B	Identification Revision

* * * E n d o f p r o c e d u r e * * *