Deduction with Monthly Maximums and Minimums
PR-1023

Overview

This Extended Solution to the Payroll module adds several new options to deduction code processing:

- Deductions can be applied only once per month
- Deductions can be applied only after a specified number of hours have been worked or after a specified amount of gross wages have been paid
- Deductions can be set up to have a monthly deduction limit (in addition to the annual limit provided by standard MAS 90 MAS 200)

Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:
http://support.sagesoftware.com/mas/extended_solutions/main.cfm

Installing Your Extended Solutions under Windows
From a CD

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

From the Sage FTP site

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions and a Shipping Manifest. If you have any problems with this order, please email extendedsolutions.na@sage.com and we will assist you during normal business hours.

Extended Solutions Control Center

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions

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- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

Custom Office
If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install this Extended Solution.

Setup
Once the disk is installed, you will need to access the Payroll Setup menu option screen. After the option screens have been displayed, a Setup screen for this Extended Solution will appear. Check the 'Enable Extended Solution' box to activate this Extended Solution (Figure 1). The manual for this Extended Solution, if it has been installed, can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).
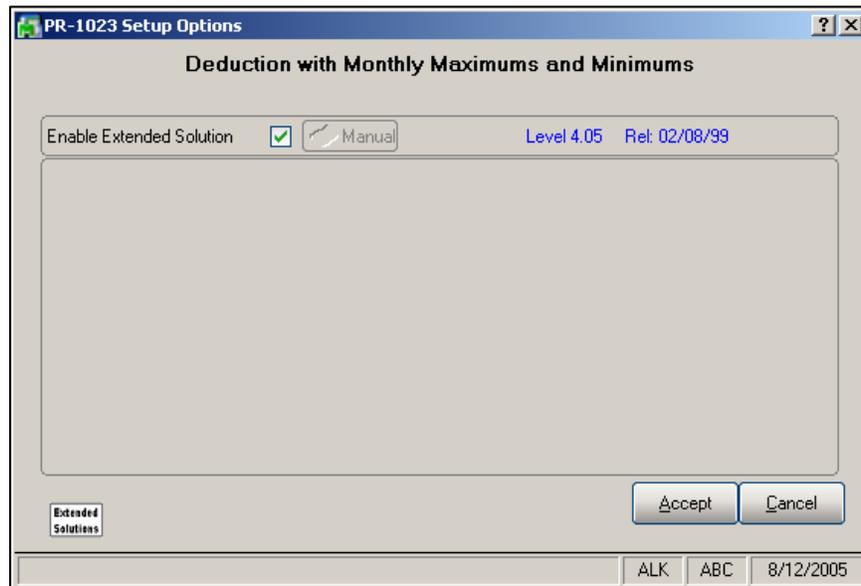

Figure 1

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Operation
Deduction Code Maintenance
Several new prompts have been added to the Deduction Code Maintenance screen (Figure 2) for this Extended Solution. Click the 'More' button to display these prompts (Figure 3):

Figure 2

Figure 3

   APPLY ONCE A MONTH: If this deduction should be applied only once per month, check this box. During deduction processing, if the amount previously deducted for this code in the current month is not zero, this deduction code will be skipped.

   MINIMUM HOURS OR WAGES: If you want to apply this deduction code only after a specified number of hours or wages have been paid, select 'Hours' or 'Wages;' select 'No Monthly Minimum' to apply this regardless of hours or wages. During deduction processing, if the total hours worked (for Hours) or gross wages (for Wages) paid in the current month (including hours and wages on the current check) exceed the Monthly Minimum value entered, only then will this deduction be applied.

MONTHLY LIMIT: If you want to limit the amount that can be deducted each month, enter the maximum here. Leave this field blank for no monthly maximum deduction amount.

Helpful Hints

- The *current month* referred to above is calculated from the Period Ending Date entered on the Payroll Cycle screen.
- If the minimum hours/wages field is left at zero, that portion of this Extended Solution will have no affect on processing.
- The Deduction Goal (which is a part of standard MAS 90 MAS 200) will still apply.
- The Monthly Limit is a Deduction Code limit; unlike the Standard Limit, it does not vary by employee.
- With the exception of the Monthly Limit, this Extended Solution does not affect the *amount* of the deduction, only *whether* the deduction is applied.
- The monthly limit is applied only when using auto deduction.

Possible Uses

The Problem: I want to deduct $75.00 union dues each month for each employee who works more than 25 hours per month.

The Solution: **Setup a deduction code as follows:**
- **Calculation Method: Fixed Amount**
- **Standard Amount/Rate: 75.00**
- **Click 'More' button**
- **Apply Once A Month? checked**
- **Minimum Hours or Wages: Hours**
- **Monthly Minimum: 25.00**
- **Click 'OK' button**

The Problem: I want to deduct the first $300.00 from an employee's net checks each month. However, not every employee is paid each check run, and sometimes the net check is less than $300.00 before deductions. If I deduct less than $300.00 on the first check, I need to deduct the balance on the next check(s).

The Solution: **Setup a deduction code as follows:**
- **Calculation Method: Percentage of Net Wages**
- **Standard Amount/Rate: 100%**
- **Click 'More' button**
- **Apply Once A Month? unchecked**
- **Monthly Limit: $300.00**
- **Click 'OK' button**

Report Master/Visual Integrator

The files listed below have been added or changed in the Data Dictionary by this Extended Solution for Report Master/Visual Integrator purposes.

New File:	Field:
PR.EARN_II	MIN_HRS/$_REQ?
	APPLY_1/MONTH?
	DED_MIN_MO
	MONTHLY_LIMIT

The Data Dictionary can contain other files and data fields that are not available without their corresponding Sage Extended Solutions installed.

Note: The Report Master module is not supported in MAS 200 SQL.

Crystal Reports and the ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

File:	Description	Field:
PR_AD	Earn Deduct File 2	All Fields

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

Upgrades and Compatibility

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.

Documentation

Only changes made to the standard operation of MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

Acknowledgments