
UPE UNION DUES DEDUCTIONS (PAY-W009)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to set up a dues deduction for certificated employees represented by United Professional Educators.

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 This is a mandatory deduction that is deducted once per month from September through June paychecks.
- 4.2 UPE – United Professional Educators
- 4.3 GTN – Gross to Net

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 Hit <Alt A> to bring up the menu window.
- 5.6 Select "Misc deduction."
- 5.7 Enter effective begin date, which is the first day of the current month.
- 5.8 GTN code is:
 - 5.8.1 D UPE – Union Dues Fee-Employees who choose to become members of UPE.
- 5.9 Hit <F3> to save.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 UPE Authorization for Dues Deduction form

7.0 RECORD RETENTION TABLE:

UPE UNION DUES DEDUCTIONS (PAY-W009)

Sacramento City Unified School District

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
UPE Authorization for Dues Deduction 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>
11/01/04	A	Initial Release
3/5/07	B	Identification Revision
02/22/08	C	Revision to work instruction.

***** End of procedure *****