

## Retroactive Payroll Payments Processing

**Effective Date:** March 11, 2016

**Function:** Payroll

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### Basis for Procedure

Retroactive payroll payments are necessary to process payroll payments for a pay period that has already passed when appointments or salary rate increases are not entered into the Oracle modules in a timely manner. The RF strongly recommends that retroactive payments do not go back any further than 90 days. In all cases, retroactivity should not be over 360 days.

### Procedure Summary

This document outlines the procedure for processing retroactive payments to a different project/task/award than what was in effect for the retroactive period. This process involves updates in the Human Resources (HR) and Labor Distribution (LD) modules.

### Procedure Steps

#### Overview of System Process

To process a retroactive payment, campus staff must take the following steps:

- Create a Retro Pay Element in the Human Resources (HR) module. The element can be created manually or system generated.
- Enter a Retro Labor Schedule to assign charging instructions for the retroactive time period. The schedule can be entered in the HR or LD module.  
**Important!** The timing for entering the labor schedule is determined by whether the Retro Pay element was manually created or system generated, and the module being used to enter the labor schedule. Refer to Step 2: Entering a Retro Labor Schedule below for more details.

#### Step 1: Creating a Retro Pay Element

A Retro Pay Element can be created one of two ways; manually or system generated.

- Manual Retro Pay Element - A manual retro pay element allows entry of the exact dollar amount and dates of the retro period and immediate entry of a retro labor schedule in the HR module. This element is created by adding a retro element to the person's assignment in the HR module with the exact dollar amount and retroactive period.
- System-generated Retro Pay Element - A system-generated retro pay element allows for automatic creation of the dollar value and retro pay element by the Oracle business system. Because the dollar amount is then calculated via an overnight process, the labor schedule cannot be entered until the next day.

The process for creating a system-generated retro pay element is different for the primary earnings element and secondary earnings element (fellowships and SUNY earnings).

To create a system-generated retro for the primary earnings element:	To create a system-generated retro for the secondary earnings element:
Enter retro information on the Salary Form in the HR module.	Enter retro information on the Element Entries screen under a person's assignment in the HR module.

**Note:** For detailed informatino on element entry, refer to the Oracle Process Help instruction [Enter a Nonrecurring Earnings or Deductions Element](#).

### Step 2: Entering a Retro Labor Schedule

Once the Retro Pay element is created, the labor schedule must be entered for the retroactive time period. The labor schedule identifies the project/task/award to process the payment against.

Retro labor schedules can be entered in either the HR or LD module in the Retro Schedule Lines form. The same principles apply in the Retro Labor Schedule form as they do in the Labor Schedules form, i.e. the labor schedules for the element must equal 100%.

The Retro Schedule Lines form can be accessed:

- in the HR module from the Retro PTAOE menu item on the drop-down list under Special; and
- in the LD module using the RF Retro PTAOE navigator item.

**Note:** For complete instructions on how to enter a Retro Labor Schedule in the HR or LD module, review the work instruction [Enter a Retro Labor Schedule](#).

**Important!** If labor schedule is not entered in the Retro Labor Schedule form then the amount paid in the retroactive element will be posted the project/task/award that was active at the time of the retroactive payment.

The timing for "when" the Retro Labor schedule can be entered depends on what module (HR or LD) is being used, and whether the Retro Pay element was manually created or system-generated.

Type of Retro Pay Element	Timing in HR Module	Timing in LD Module
Manual	Labor schedule can be entered immediately after the Retro Pay element has been saved.	Labor schedule cannot be entered until the next day. A nightly process must run to update tables in the LD module before the schedule can be entered.
System Generated	Labor schedule cannot be entered until the next day in the HR or LD modules. Nightly processes must run in both modules before the labor schedule can be entered.	

## Monitoring Biweekly and SUNY Retro Reports

When the retroactive process is run, the following reports will be produced for each campus so that retroactive payments can be reviewed every day:

- Biweekly Retro Report
- SUNY Retro Report

The reports list the assignment number for people for whom no retroactive payment was calculated and should have been. Campuses should review the input for all people listed on the report and make the necessary corrections. If the report says "All retro's have been calculated . . ." there were no errors for that campus. Refer to the section Guidelines for Reviewing Input.

### Access to Reports

To access the Biweekly and SUNY Retro Reports, log in with your user name and password to the RF Web site at [www.rfsuny.org](http://www.rfsuny.org). If you don't have a user name and password, please contact Customer Services (518-434-7222). Once you're logged in:

1. Click the Payroll Reports link in the Business Applications portal.
2. Click the link for your campus.
3. Enter your Payroll Reports user name and password and press Enter.
4. Click Biweekly Retro Report or SUNY Retro Report.

### Guidelines for Reviewing Input

Some examples of errors to look for when reviewing input are:

- Retro Required field value did not equal 'Yes';
- Retro begin or end date was past the date of the last payroll; and
- For SUNY earnings, stipends, and salary 2-4 elements, entry was not date tracked to the beginning date of the retro.

**Note:** In instances where a person has leave without pay, do not enter the negative amount in a retroactive element. This will make all future retroactive calculations incorrect. Use the special input version of the earnings element. Then when entering future retroactive, a message will be displayed indicating that a special input has been entered during the retroactive period and the retroactive amount should be manually calculated.

## Definitions

*None*

## Related Information

[Enter a Retro Labor Schedule](#)

## Forms

[Employee Assignment Form](#)

[Oracle Information Change Form](#)

## Change History

Date	Summary of Change
February 28, 2024	Updated contact information and links
March 11, 2016	Changed reference from work instructions to Process Help, combined Retroactive Payroll Payments Processing and Reviewing retroactive Payroll Payments.
January 13, 2005	New document.

### Feedback

Was this document clear and easy to follow? Please send your feedback to [webfeedback@rfsuny.org](mailto:webfeedback@rfsuny.org).