

Syllabus Title:	Payroll and Personnel Fast Track
Facilitator	TBA
Availability	TBA
Prerequisites	None
Contact Hours	Monday through Friday, 8:00am to 5:00pm
Contact Avenues	Phone: 800.686.9313 FAX: 937.836.1036 email: support@civicacmi.com Web: www.civicacmi.com U.S. Mail: 52 Hillside Court, Englewood, OH, 45322
Course Description	Course content is targeted for beginners and experienced users who need a basic knowledge of the concepts and procedures involved with CMI's payroll application. Participants will be familiarized with: coding practices for deductions, hours, and taxes; data entry practices; the functionality of check reconciliation and accrual processing; reporting; and querying of records.
Duration	This course requires a full day commitment.
Course Goals	Upon completion of this unit, participants will be familiar with: <ul style="list-style-type: none">✓ Basic employee records.✓ Deduction, time, accrual, and tax codes.✓ Set up and processing of timesheets.✓ Generating payroll checks and vouchers.✓ Reconciling checks.✓ Printing State and Federal reports.✓ Printing Pension reports.✓ Record Inquiry.
Course Format	Training is offered on this subject using six modules of varying length that make up a six-hour training day. Each module is designed to highlight key payroll concepts and procedures. Using a lecture/presentation format, a facilitator will illustrate principles and step participants through simulated tasks. It provides an overview of the application and the conventions used throughout CMI's Payroll system.
Reference Material	Application Reference Manual. Additional Course Hand-Outs will be provided as needed.

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Class Rules of Conduct

- ✓ Turn off cell phones.
- ✓ Food and drink are permitted in the classroom.
- ✓ Participate fully and share your ideas.
- ✓ Clients should respect their fellow students by refraining from holding private conversations during lectures and allowing other students to ask questions.

Course Schedule

Module One: Overview of PayX Conventions

Designed for all users.

- ✓ Explanation of security access.
- ✓ The menus and toolbar components.
- ✓ Keyboard conventions. Mouse usage and Keystroke Hotkeys.
- ✓ The Favorites Menu. How to build a custom user menu.
- ✓ Effective use of restrictions on report setup screens.
- ✓ Printer conventions.

Module Two: Setting up Payroll Codes and Employee Files

Designed for users who setup and maintain employee records.

- ✓ Review of coding: deductions, hours, accruals, tax tables.
- ✓ Set up employee files to include accruals, withholding, bank, and default timesheet options.
- ✓ Review other employee file options, especially year-to-date and prior year data, and where to find timesheet and paycheck information.

Module Three: Journal Entries and Personnel files

Designed for personnel and payroll administrators.

- ✓ Enter accrual journal entries and process.
- ✓ Discuss block employee changes.
- ✓ Review personnel maintenance.
- ✓ Employee and Personnel Record inquiry.

Module Four: Processing Timesheets

Designed for payroll administrators.

- ✓ Enter timesheets individually or by select list.
- ✓ Process timesheets through check printing and final reports.
- ✓ Interfacing payroll expenses with CMI's Finance application.

Module Five: Checks Reconciliation and Accrual Processing

Designed for payroll administrators.

- ✓ Check reconciliation and add/void deduction checks.
- ✓ Process accruals for Medicare and pension to interface into CMI's Finance application.

Module Six: Report Processing

Designed for supervisors.

- ✓ Review standard reports.
- ✓ Review report for federal, state, and local taxes.
- ✓ Process OBES, OPERS, and Police and Fire pension reporting.
- ✓ Setup and Execution of a User Defined Report.

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Additional Resources

Students may continue to develop ideas and practices via our Finance/Payroll User Forum on the Web! Point your browser to "forum.civicacmi.com", login with your User ID and Password (registration required), and start a thread on any Payroll topic, -and feel free to respond with useful information to other postings! *This forum is moderated.*