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Skyward SMS - Breakout Session



Skyward SMS - Breakout Session

Introductions



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North Shore SD 112



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New W-2 Reporting Requirements



Overtime Provisions

0.5x Calculation Rate

Updated standards for tracking and reporting overtime provisions correctly.



W-2 Box Mapping

Properly map W-2 boxes to the appropriate deduction codes.

Ensures accurate year-end payroll reconciliation and tax compliance.



Holiday OT Rules

Doesn't Count!

- Should be its own distinct pay code
- Separate tracking required for Daily OT

Qualified OT Example

Kathy makes \$20/hour and works 50 hours in one week. Her pay looks like:

- Regular hours: $40 \times \$20 = \$800$
- Overtime hours: $10 \times \$30 = \$300$
- Total wages = \$1,100

The \$300 overtime pay consists of:

- \$200 → the regular \$20/hour portion
- \$100 → the additional \$10/hour overtime premium

The \$100 is the qualified overtime compensation

Qualified overtime is the “time-and-a-half” part of the pay

The \$100 is the qualified overtime compensation.

Mapping for W2 2026 Overtime Pay Codes

Pay Code Maintenance - WH\EP\PS\CO\PA - 25379 - 05.26.10.00.02 - Google Chrome

Not secure skydevapp05/scripts11/cgiip.exe/WService=64511web/hprpayedit001.w?isPopup=true

Pay Code Maintenance (101)

Pay Code Maintenance

Pay Code: REGOT

* Short Description: REG OVERTIME

* Description: REG OVERTIME

Rate Type: No

Contract: No

Auto-Calc: No

☒ Qualified Overtime Overtime Rate of Pay:

Illinois Fields

Payment Reason:

IMRF Adjustment:

IMRF Overtime: No

Double Time

Half Time

Time and a Half

Asterisk (*) denotes a required field

The premium portion of overtime pay that is eligible for tax deduction.

Mapping for W2 2026 Benefit/Deduction Codes

PAYROLL : PAY TYPE DETAILS

Pay Type List > Pay Type Details

Pay Type Code 1004	Pay Type Description Principal	Check Stub Description Principl	Default Pay Schedule Code 26-JUL
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General

*Salary Adjustment Type: I - Immediate Adjustment

Factor Default: Salary Factor One

Hours Worked Type: Assignment Pay Period

Contract: ☒

Payroll Encumbrance Type: Include

Payroll Encumbrance Calculation Method:

IL STATE REPORTING

Exclude from TRS Full Annual Rate: ☐

TRS Include in Days Paid: ☒

EIS Pay Type: Base Salary

TRS Payment Reason: BS Base Salary

IMRF Overtime Type:

IMRF Adjustment Reason:

FEDERAL REPORTING

1099-R Reportable: ☐

W2 Box:

W2 Box 14 Set:

IL STATE REPORTING

Exclude from TRS Full Annual Rate: ☐

View: Skyward Default Filter: Skyward Default More

	↑ 1 Box Number	↑ 2 Box Type	↑ 3 Description
TRS Include in Days Paid			
EIS Pay Type			
TRS Payment Reason	Select	11	Non-Qualified Deferred Compensation [Section 457(b)]
IMRF Overtime Type	Select	11 N	Non-Qualified Deferred Compensation [Non-Section 457(b)]
IMRF Adjustment Reason	Select	12 CC	HIRE exempt wages and tips
	Select	14	Other

FEDERAL REPORTING

1099-R Reportable: < < > > 50 Total Records

W2 Box:

W2 Box 14 Set:



Mapping for W2 2026

HR\PA\YE\PA\CA\WP - 3084 - Edit W2 Workfile Records

Control number		Void	☐	Info Soon D Aburtoscr	FICA Type: F	Tax State: IL	Location: 001	OK	Cancel		
Employer's identification number	000002067	1 Wages, tips, other compensation	3,000.07	2 Federal income tax withheld	233.13	View PDF					
Employer's name, address, and ZIP code	EMP 1 - Skyward Test Scho 832 S RAND ROAD LAKE ZURICH IL 60047	3 Social security wages	3,329.71	4 Social security tax withheld	206.44						
		5 Medicare wages and tips	3,329.71	6 Medicare tax withheld	48.28						
		7 Social security tips	0.00	8 Allocated tips	0.00						
Employee's social security number	123-00-1730	9 Verification code	- - -	10 Dependent care benefits	0.00						
Employee's name, address, and ZIP code	SOON D ABURTOSCR 623 STRATFORD LANE SCHAUMBURG IL 60193	11 Nonqualified plans	Sec 457: 0.00 Not 457: 0.00	12	Letter Year Amount						
		13 Stat. Empl Retire Plan 3rd Party Sick	☐ ☒ ☐		☐ ☐ 0.00						
		14 Other	LZEA 42.90 PPO2S 438.84 Shoes 484.00		☐ ☐ 0.00						
					☐ ☐ 0.00						
☐ Address Truncated (Choose Edit to review)											
15 State/Employer's state I.D.	IL 111111111	16 State wages, tips	3,000.07	17 State income tax	142.78	18 Local wages, tips	0.00	19 Local income tax	0.00	20 Locality name	
			0.00		0.00		0.00		0.00		
Form W-2 Wage & Tax Statement 2025											
The W2 control number.										SkyDoc	#

Mapping for W2 2026

HR\PA\YE\PA\CA\WP - 3084 - W2 Select Deduction / Benefits

This screen displays Ded/Ben codes used to create the W2 work file. All selected codes (bottom browses) MUST have a valid entry in the 'W2 Info' column. The 'W2 Info' field determines where the ded/ben will be placed on the W2. To change the 'W2 Info' for a particular code, highlight the code in the bottom browse. The 'W2 Info' for the highlighted code displays below the browse and can be modified. Note: Changing the 'W2 Info' on this screen updates the 'W2 Info' field on the Ded/Ben setup screens.

OK Help Cancel

Available Deduction Codes				
Code	Description	W2 Info	Grp	Increase Fed Grs
02001	TI Crabtree	None	MSC	No
02004	TI Bradley	None	MSC	No
02007	Dipietro - 1957	None	MSC	No
05007	SS - W2	None	MSC	No
06000	Miscellaneous	None	MSC	No
06001	Trans Drug Test	None	MSC	No

↓ Add ↑ Remove ↑ Rem.All Lookup: 02001

Selected Deduction Codes				
Code	Description	W2 Info	Grp	Increase Fed Grs
01020	Eic	2-Adv EIC	EIC	No
10901	Frs-Ha-Employee	3-Box 14	RET	Yes
10902	Frs-Pa-Employee	3-Box 14	RET	Yes
10903	Frs-Ca Employee	3-Box 14	RET	Yes
10905	Frs-Hi-Employee	3-Box 14	RET	Yes
10906	Frs-Pi-Employee	3-Box 14	RET	Yes

Lookup: 10901

Deduction Information

W2 Info: 3-Box 14

Select the W2 Info: G-457 H-501(c)(18)(D) L-Emp Business Exp

Available Benefit Codes				
Code	Description	W2 Info	Grp	Increase Fed Grs
05007	SOC SEC ADJ	None	OTH	No
08001	Workers Comp 1	None	OTH	No
08002	Workers Comp 2	None	OTH	No
08003	Workers Comp 3	None	OTH	No
08004	Workers Com Adj	None	OTH	No
10001	FI Retire Ha	None	RET	No

↓ Add ↑ Remove ↑ Rem.All Lookup: 05007

Selected Benefit Codes				
Code	Description	W2 Info	Grp	Increase Fed Grs
09001	ADOPTION BENEFI	T-Empr-provided Adopt Be	OTH	Yes
15015	Board Match	DD-Empr Spon Hlth Cov	OTH	No
15016	Board Match	DD-Empr Spon Hlth Cov	OTH	No
15020	Board Match	DD-Empr Spon Hlth Cov	OTH	No
15025	Board Match ADJ	DD-Empr Spon Hlth Cov	OTH	No
SFC	SFC	D-401k	RET	No

Lookup: 09001

Benefit Information

W2 Info: T-Empr-provided Adopt Ben

SkyDoc

Mapping for W2 2026

HR\PA\YE\PA\CA\WP - 3084 - Modify Current W2 Workfile

Workfile Information

Calendar Year: 2026

HR\PA\YE\PA\CA\WP - 3084 - Directory Entry for Text Files

Regular FIC

File Location: Browse...

Box to import: ☒ BOX 12 ☐ BOX 14

Employee Identifier: ☐ Name Key ☒ SSN ☐ Profile Employee ID ☐ Name ID

File Format Help

You may upload any CSV, but the following columns and cell headers must be used (in any order):

- EMPLOYEE ID - (required) This field must match the Employee Identifier selected above.
- CODE 1 - (optional) Contains the box Code for line 1 of the W2.
- YEAR 1 - (optional) Contains the box Year for line 1 of the W2 (Box 12 only).
- AMOUNT 1 - (optional) Contains the box Amount for line 1 of the W2.
- CODE 2 - (optional) Contains the box Code for line 2 of the W2.
- YEAR 2 - (optional) Contains the box Year for line 2 of the W2 (Box 12 only).
- AMOUNT 2 - (optional) Contains the box Amount for line 2 of the W2.
- CODE 3 - (optional) Contains the box Code for line 3 of the W2.
- YEAR 3 - (optional) Contains the box Year for line 3 of the W2 (Box 12 only).
- AMOUNT 3 - (optional) Contains the box Amount for line 3 of the W2.
- CODE 4 - (optional) Contains the box Code for line 4 of the W2.
- YEAR 4 - (optional) Contains the box Year for line 4 of the W2 (Box 12 only).
- AMOUNT 4 - (optional) Contains the box Amount for line 4 of the W2.

The import will overwrite all lines in the box you are importing.

Location of the import file. SkyDoc

Select to import

Import

Cancel

View

Add

Edit

Delete

Close

Export

Import



Leaves of Absences



FMLA

Family and Medical Leave Act coverage for qualified medical and family reasons.



Workers Compensation

Coverage and protection for work-related injuries or illnesses.



Sabbatical

Extended leave granted for research, study, or professional development.

TRS Gemini Reporting Resources



Leaves of Absence - Qmlativ

Add TRS Employee Leave History

Enter TRS Employee Leave History Details

 Save  Cancel

TRS EMPLOYEE LEAVE HISTORY DETAILS

*Calendar

*Pay Schedule

*Pay Schedule Detail Start

*Pay Schedule Detail End

*Job Category

Leave Reason

Retirements - Heads Up!



Earnings Tracking

Method to track earnings for those on the retirement track

Important so they do not go over 6%



Post-Retirement Payouts

It's all about timing!

Ensure proper scheduling and execution of post-retirement distribution.



Single Sum Retirees

No post-retirement hour limitation



S2Q



Term Dates

Ensure there are term dates for those that are no longer employed.



Codes & Deductions

Pay Codes, Deductions and Benefit Codes - place a "z" in front of the "Check Stub Description"

If they've never been used, then delete the code!



Old Assignments

Ensure "old assignment" in Employee Management has end date.



Substitutes

Subs - Need to have a "SUB" Position in EM



Questions and Answers

We thank you for your time!



Skyward IL User Group

SKYCON Qmlativ Discussions



IL SkyCon will be hosting FREE virtual meetings with other IL school districts to discuss Skyward® Qmlativ. This is open to all Skyward® users. There is no commitment to participate each time - just join when you're able.

STUDENT - 1st and 3rd Thursday of the month from 1:00-2:30pm beginning 9/17

ERP (FINANCE/HR) - 2nd Thursday of the month from 1:00-2:30pm beginning 10/8

Note: Please accept the original calendar invite so that you will have access to all the meetings (even if you cannot attend).

[Register for SKYCON Qmlativ Discussions](#)

SKYCON 2026



[Register for SKYCON 2026](#)

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Latest Discussions



RE: Separate Extra Duty Payroll

By: [Lyssette Visser](#), 18 days ago

Hi Hunter, We process stipends and extra-duty payments on a separate payroll five times per year. One reason this works ...



Save the Date, Registration Opens Soon

Mark your calendar, **Friday, March 12** is the next Bookkeepers Conference at the Meridian Banquets & Conference Center, Rolling Meadows.



Illinois ASBO Online Resources

Support Professionals

School Business 101: Payroll 101 Part 1 (Payroll Configuration)



Build a stronger understanding of one of the most critical functions in the business office — payroll. This School Business 101 explores payroll fundamentals and payroll system configuration, helping payroll professionals better understand processes, setup considerations and the behind-the-scenes work that ensures employees are paid accurately and on time.

[View Session](#)

PAYROLL
essentials





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