



# Add New Employee

Before adding an employee to WebSmart check the TRAQS site to see if they are a TRS member. Enter the name in WebSmart as listed with TRAQS.



To Add a New Employee

Finance > HR > Staff Manager

Local ID	SSN	Name	Employment Status	Facility	Actions
005476	X00-00-5476	Aamodt, Catrina	1379 - Contractual	Facility 2	
000181	X00-00-0181	Ambuehl, Howard	1385 - Non-contractual	Facility 10	
000097	X00-00-0097	Anastasia, Oretha	1379 - Contractual	Facility 2	
000113	X00-00-0113	Arabian, Shondra	1379 - Contractual	Facility 2	
000186	X00-00-0186	Artinger, Ailene	1378 - Probationary	Facility 10	
009438	X00-00-9438	Auten, Benedict	1380 - Substitute/temporary	Facility 4	
008624	X00-00-8624	Averhart, Michel	1380 - Substitute/temporary	Facility 2	
009404	X00-00-9404	Avino, Maira	1378 - Probationary	Facility 1	
000233	X00-00-0233	Azoulay, Cristopher	1385 - Non-contractual	Facility 10	
008997	X00-00-8997	Bahde, Justa	1379 - Contractual	Facility 1	

Select Add/Find Staff

## Complete Search Criteria (one or more of the following)


- ▶ Name - First Middle Last
- ▶ SSN/State ID - Enter the Social Security Number of the Employee
- ▶ Birthdate - Enter the Birthdate of the Employee


**Find Staff**

**Search Criteria**


**Name** *First*  *Middle*  *Last*


**SSN/State ID**

**Birthdate**  

 **Search**

Click  **Search**

If there are no employees to match your criteria click  **Create New Staff**

**Search Results**  **Create New Staff**

No Staff Match This Criteria

\*This screen contains demographic data used in State PEIMS reporting

**New Staff**


New Staff!!

**Demographics**

**Name** *First*  *Middle*  *Last*  *Suffix*

**Preferred Name**

**State ID / SSN\***

**Birth Date\***  



**Gender\***

**Ethnicity\***

**Race\***  Asian  Black African American  American Indian/Alaskan Native  Native Hawaiian/Pacific Islander  White

**Employment Status\***

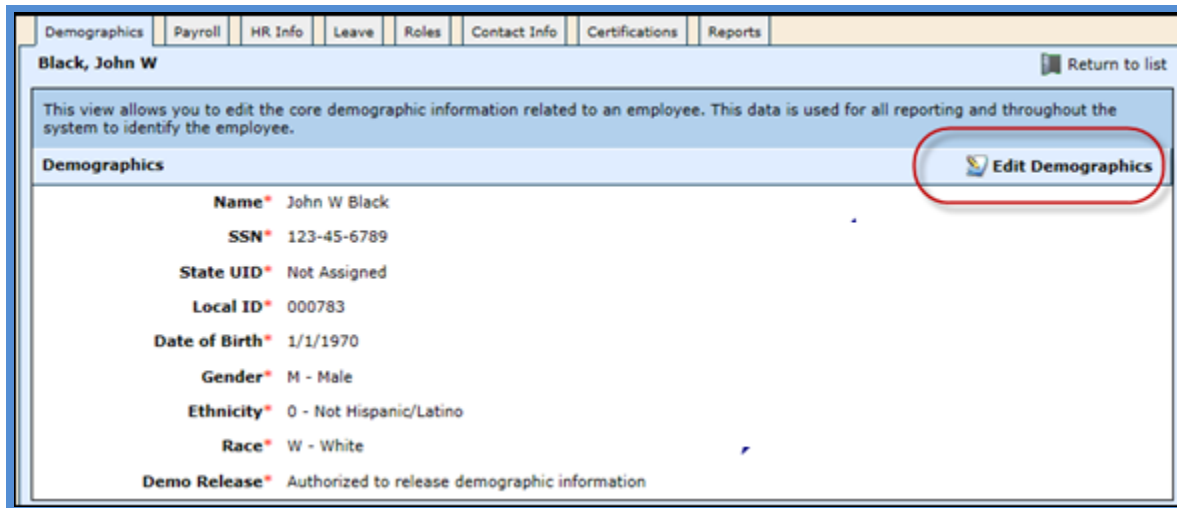
**Primary Facility\***

 **Create**  **Cancel**

- ▶ **Name** - First Middle Last. Use Drop Down box for Suffix
- ▶ **Preferred Name** - Enter any preferred name of employee (example maiden name or nickname)
- ▶ **State ID/SSN** - Will already be entered if used in the search criteria.
- ▶ **Birthdate** - Enter birthdate in MM/DD/YYYY format

- ▶ **Gender** – Select the gender of the employee from drop down box
- ▶ **Ethnicity** - Select the appropriate ethnicity of the employee from drop down box
- ▶ **Race** - Select all applicable boxes for **Race**. At least one box must be checked, multiple boxes are permitted.
- ▶ **Employment Status** – Select the employment status of the employee from the drop down box.
- ▶ **Primary Facility** – Select the employees primary facility from the drop down box.


Select  **Create**



Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

**Black, John W** Return to list

This view allows you to edit the core demographic information related to an employee. This data is used for all reporting and throughout the system to identify the employee.

**Demographics**  **Edit Demographics**

**Name\*** John W Black

**SSN\*** 123-45-6789

**State UID\*** Not Assigned

**Local ID\*** 000783

**Date of Birth\*** 1/1/1970

**Gender\*** M - Male

**Ethnicity\*** 0 - Not Hispanic/Latino

**Race\*** W - White

**Demo Release\*** Authorized to release demographic information

 **Edit Demographics**

Click  **Edit Demogrphics**

Edit all the demographic fields that need to be edited.

► **Demo Release** – Select from the drop down box if the employee has authorized or declined the release of their demographic information.

Select  Save

## Payroll - Add Contracts

The contract contains service record and contract information used in payroll processing and printing service records. All employees must have a contract to be included in the payroll process. The contract replaces the Service Record

 Adding Contracts

Finance > HR > Staff Manager > Select Employee > Payroll Tab

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Documents	Reports	
Black, John W									Return to list
...									
<b>Employment Contracts</b>									
Page Size: 10	Period: Current Period	District: All Districts	Filter: Active Contracts						
System ID	Period	District	Contract Dates	Days	% of Day	Positions	Actions		
No Configurations Found									
Records: 0									Page 1 of 1

Click  Add Contract

<b>Employment Contract</b>	
<b>Contract Type*</b>	FTE
<b>District*</b>	Select a district.....
<b>Instructional Period*</b>	Select a period.....
<b>Contract Terms</b>	
<b>Contract Type*</b>	10 MONTH
<b>Contract Days*</b>	
<b>Contract Begin*</b>	
<b>Contract End*</b>	
<b>Status*</b>	* - Active
<b>Contract Attributes</b>	
<b>Primary Role*</b>	Select a position type.....
<b>Percent Of Day*</b>	0
<b>Pay Step*</b>	
<b>Local Experience*</b>	
<b>Prof. Experience*</b>	
<b>Payment Attributes</b>	
<b>Statutory Tax Status*</b>	State Retirement and Medicare Eligible
<b>FUTA Exempt*</b>	False - FUTA Taxes apply to this employee
<b>SUTA Exempt*</b>	False - SUTA Taxes apply to this employee
<b>Overtime Exempt*</b>	False - Employee is eligible for overtime
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	




- ▶ **Contract Type** - Select the appropriate contract type from the drop down box. FTE – Employee or Contractor
- ▶ **District** – Select the district the employee is associated with from the drop down box.
- ▶ **Instructional Period** – Select the instructional period from the drop down box
- ▶ **Contract Type** – Select the contract type from the drop down box. This indicates the number of days or months the employee’s contract contains.


- ▶ **Contract Days** - Enter the number of contract days of the employee's contract: Examples:
  - If an employee is on a 187 day contract and is working full time, enter 187 days in this field.
  - If an employee came in mid-year and is only working 90 days out of the 187 day contract, enter 90 in this field.
- ▶ **Contract Begin** – Enter the contract begin date. This field should indicate the date of the employees first day of the employee contract.
- ▶ **Contract End** – Enter the contract end date. This field should indicate the last date the employee is working during the year.
- ▶ **Status** – Select the appropriate employment status from the drop down box.
- ▶ **Primary Role** – Select the primary position from the drop down box.
  - If the employee has a position that is exempt from PEIMS, select the position that indicates it is not a reportable position.
- ▶ **Percent of Day** – Enter the percent of day from the drop down box. This indicates the percent of the day that the employee is working for the district.
- ▶ **Pay Step** – Enter the pay step of the employee (if applicable).
- ▶ **Local Experience** – Enter the number of years experience the employee has had at the district.
- ▶ **Professional Experience** – Enter the number of years experience the employee has had in all school districts. (information comes from prior service records).
- ▶ **Statutory Tax Status** – Select the appropriate statutory taxes for the employee from the drop down box.
  - Ineligible for all statutory adjustments – H1B Visa employees
  - Medicare eligible only – retired employees
  - Fica and Medicare eligible – substitutes
  - State retirement eligible only - [Click here to view eligibility](#)
  - State retirement and Medicare eligible – the norm for most staff contributing to TRS
  - FICA, Medicare and State Retirement eligible – for schools districts that participate in FICA and TRS options
- ▶ **FUTA Exempt** – Select if the employee is FUTA eligible
  - True – FUTA Taxes DO NOT apply to this employee
  - False – FUTA Taxes apply to this employee
- ▶ **SUTA Exempt** – Select if the employee is SUTA eligible.
  - False – SUTA Taxes apply to this employee – Applies to most employees
  - True – SUTA Taxes DO NOT apply to this employee – some superintendents may be considered SUTA Exempt
- ▶ **Overtime Exempt** – Select if the employee is eligible for overtime.
  - True – Employee is NOT eligible for overtime –applies to exempt employees
  - False – Employee is eligible for overtime – applies to nonexempt employees

Click  Save



## Edit Contracts

System ID	Period	District	Contract Dates	Days	% of Day	Positions	Actions
1161	2014-2015	ILTexas (STAFF UPGRADE) - 057848	8/14/2014 - 6/5/2015	187 / 187	100%	1 Position(s)	  

Click  to edit the contract

**Employment Contract**

**Contract Type\*** FTE

**District\***

**Instructional Period\*** 2014-2015 School Year

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**Contract Terms**

**Contract Type\*** 10 MONTH

**Contract Days\*** 194

**Contract Begin\*** 9/1/2014

**Contract End\*** 8/31/2015

**Status\*** \* - Active

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**Contract Attributes**

**Primary Role\*** TEACHER

**Percent Of Day\*** 100

**Pay Step\*** 12

**Local Experience\*** 0

**Prof. Experience\*** 12

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**Payment Attributes**

**Statutory Tax Status\*** State Retirement and Medicare Eligible

**FUTA Exempt\*** False - FUTA Taxes apply to this employee

**SUTA Exempt\*** True - SUTA Taxes DO NOT apply to this employee

**Overtime Exempt\*** True - Employee IS NOT eligible for overtime

Edit the fields that need to be changed

Select  Save


# Payroll - Add Positions


Finance > HR > Staff Manager


Click  **Positions(s)**




System ID	Period	District	Contract Dates	Days	% of Day	Positions	Actions
978	2014-2015		9/1/2014 - 8/31/2015	194	100%	0 Position(s)	  

Select  to edit the position

Select  to edit the contract

Select  to terminate the employee and calculate the payoff

Select  to delete the position. The position can only be deleted if it has not been linked to a payroll.

Select  **Positions**

0 Position(s)

Click  Position



System ID	Calendar	Name	PAC/DE	Coding	Calculation	Actions
No Positions Found						



Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 187 / 187 days or 1.0000

**Position Details**

Payroll Calendar\* Monthly

Name\* Teacher

Position Type\* CT Teacher

Payroll Activity Code\* 80 - Base Salary

WC Category\* Exempt


Allocation\* 100.00

Compensation Type\* : Salary

Rate\* 43,000.00 Enter Non-Prorated Value

Exempt From Dock\* False - Wages earned from the position are used to calculate dock rate

Straight Time Mask\* 101-00-6112-00-000-7-00-0-00  Use for O/T as well

- ▶ **Payroll Calendar** – Select the appropriate payroll calendar from the drop down box.
  - ▶ **Name** – Enter the name of the position of the employee.
  - ▶ **Position Type** – Select the appropriate position type from the drop down box.
  - ▶ **Payroll Activity Code** – All wage or salary amounts for normal positions are code 80. Please refer to the PEIMS Code Table – Payroll Activity Code. [Click here to view code tables](#)
  - ▶ **WC Category** – Select the appropriate Workman’s comp category for the employee’s position from the drop down box.
  - ▶ **Allocation** – Enter the allocation
    - Salary Employees – For PEIMS reporting purposes the percent of the salary is entered into this field.
    - Hourly/Daily Employees – Enter 100 in the field.
  - ▶ **Compensation Type** – Select the appropriate compensation type for the employee.
  - ▶ **Rate** – Enter the rate of pay of the employee.
    - Salary – Enter the employees annual salary
    - Daily – Enter the employees daily rate
    - Hourly – Enter the employees hourly rate
  - ▶ **Non – Prorated Value** – Select this option if you need to add a stipend of an employee’s pay but do not want it to prorate based on the main contract.
  - ▶ **Exempt from Dock** – Select if this position is exempt from being docked.
    - False – Wages earned from the position are used to calculate dock rate
    - True – Wages earned from the position are NOT used to calculate dock rate
  - ▶ **Straight Time Mask** – Enter the payroll code for this position. ([Click here to view FASRG](#))  
Module 1 for ISD Module 11 for Charters
- ▶  the box if you choose to use the straight time mask as the overtime code as well

<input type="checkbox"/> Scheduled	Payroll Period	Pay Date	Post Date	<input type="checkbox"/> Scheduled Amount	Actual Amount
<input type="checkbox"/>	Batch #1211 09/01/2014-09/30/2014	9/30/2014	9/30/2014		Not Paid
<input type="checkbox"/>	Batch #1229 10/01/2014-10/31/2014	10/31/2014	10/31/2014		Not Paid
<input type="checkbox"/>	Batch #1249 11/01/2014-11/30/2014	11/30/2014	11/30/2014		Not Paid
<input type="checkbox"/>	Batch #1260 12/01/2014-12/31/2014	12/31/2014	12/31/2014		Not Paid
<input type="checkbox"/>	Batch #1273 01/01/2015-01/31/2015	1/31/2015	1/31/2015		Not Paid
<input checked="" type="checkbox"/>	Batch #1284 02/01/2015-02/28/2015	2/28/2015	2/28/2015		Not Paid
<input type="checkbox"/>	03/01/2015-03/31/2015	3/31/2015	3/31/2015		
<input type="checkbox"/>	05/01/2015-05/31/2015	5/31/2015	5/31/2015		
<input type="checkbox"/>	04/01/2015-04/30/2015	4/30/2015	4/30/2015		
<input type="checkbox"/>	06/01/2015-06/30/2015	6/30/2015	6/30/2015		
<input type="checkbox"/>	07/01/2015-07/31/2015	7/31/2015	7/31/2015		
<input type="checkbox"/>	08/01/2015-08/31/2015	8/31/2015	8/31/2015		


Pay periods already paid for the year prior to employees hire date

Pay periods remaining for the year that employee is eligible

This will replace the calculated amount with the "actual" paid amount. Used only in conversion

Save Cancel

► **Promote Position** – Use drop down box to select if this position should promote to the next school year. For example, you may elect not to promote a stipend or extracurricular position.

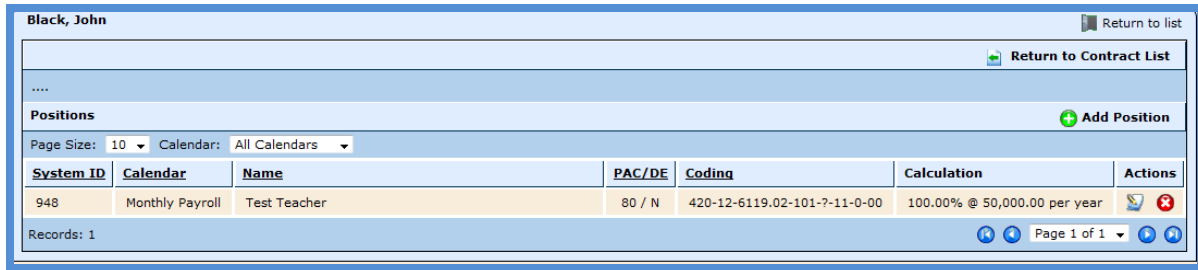
►  Check the pay periods in which the employee will receive their pay. If an employee is hired mid-year, you will not be able to select those payroll batches that have already been paid to be included in their payment schedule. The available payments will calculate once the payment schedule has been saved. To see the payment schedule, you will have to exit this screen and click back on it to review.



<input type="checkbox"/> Scheduled	Payroll Period	Pay Date	Post Date	<input type="checkbox"/> Scheduled Amount	Actual Amount
<input type="checkbox"/>	Batch #1211 09/01/2014-09/30/2014	9/30/2014	9/30/2014		Not Paid
<input type="checkbox"/>	Batch #1229 10/01/2014-10/31/2014	10/31/2014	10/31/2014		Not Paid
<input type="checkbox"/>	Batch #1249 11/01/2014-11/30/2014	11/30/2014	11/30/2014		Not Paid
<input type="checkbox"/>	Batch #1260 12/01/2014-12/31/2014	12/31/2014	12/31/2014		Not Paid
<input type="checkbox"/>	Batch #1273 01/01/2015-01/31/2015	1/31/2015	1/31/2015		Not Paid
<input type="checkbox"/>	Batch #1277 02/01/2015-02/28/2015	2/28/2015	2/28/2015		Not Paid
<input checked="" type="checkbox"/>	Batch #1279 03/01/2015-03/31/2015	3/31/2015	3/31/2015	[calculated on save]	Not Paid
<input checked="" type="checkbox"/>	05/01/2015-05/31/2015	5/31/2015	5/31/2015	[calculated on save]	
<input checked="" type="checkbox"/>	04/01/2015-04/30/2015	4/30/2015	4/30/2015	[calculated on save]	
<input checked="" type="checkbox"/>	06/01/2015-06/30/2015	6/30/2015	6/30/2015	[calculated on save]	
<input checked="" type="checkbox"/>	07/01/2015-07/31/2015	7/31/2015	7/31/2015	[calculated on save]	
<input checked="" type="checkbox"/>	08/01/2015-08/31/2015	8/31/2015	8/31/2015	[calculated on save]	

Do not promote this position

Save Cancel

Click  Save



System ID	Calendar	Name	PAC/DE	Coding	Calculation	Actions
948	Monthly Payroll	Test Teacher	80 / N	420-12-6119.02-101-?-11-0-00	100.00% @ 50,000.00 per year	 

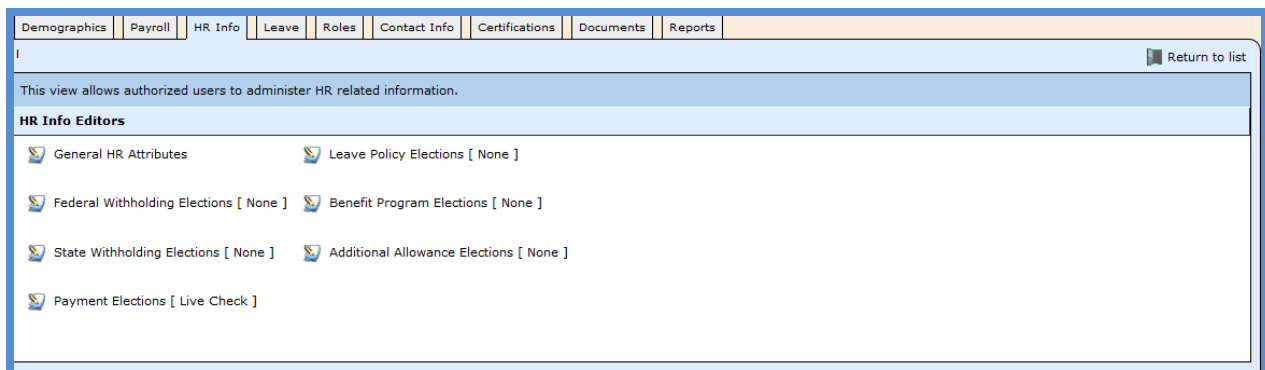
If an employee has more than one position click  **Add Position** and fill in information for all positions for this employee's contract.

Click  **Return to Contract List**

## Payroll - Add HR Info

Finance > HR > Staff Manager








 **Edit HR Info**



Demographics | Payroll | **HR Info** | Leave | Roles | Contact Info | Certifications | Documents | Reports

This view allows authorized users to administer HR related information.

**HR Info Editors**

-  General HR Attributes
-  Leave Policy Elections [ None ]
-  Federal Withholding Elections [ None ]
-  Benefit Program Elections [ None ]
-  State Withholding Elections [ None ]
-  Additional Allowance Elections [ None ]
-  Payment Elections [ Live Check ]

Click  **General HR Attributes**

<b>HR Information</b>	<b>Return to HR Information Menu</b>
<b>Other Settings / Values</b>	
<b>Primary Facility*</b>	
<b>Employment Status*</b>	AWE - At-Will Employment (Exempt)
<b>Degree Type*</b>	
<b>Original Hire Date*</b>	None
<b>Retirement Date</b>	None

Click **Edit Attributes/Values**

<b>Black, John</b>	<b>Return to list</b>
<b>HR Information</b>	
General HR information	
<b>Other Settings / Values</b>	
<b>Primary Facility*</b>	<input type="text"/>
<b>Employment Status*</b>	1379 - Contractual
<b>Degree Type*</b>	0 - No Degree
<b>Eligible For Rehire*</b>	Eligible for re-hire
<b>Original Hire Date*</b>	<input type="text"/>
<b>Retirement Date</b>	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- ▶ **Primary Facility** and **Employment Status** are pre-filled however can be edited.
- ▶ **Degree Type** – Select the highest degree the employee has received from the drop down box.
- ▶ **Eligible for Rehire** – Upon termination select if the employee is eligible for rehire with the district.
- ▶ **Original Hire Date** – Enter the actual hire date of the employee MMDDYYYY
- ▶ **Retirement Date** – Enter the retirement date of the employee if applicable MMDDYYYY

Click **Save**

Black, John Return to list

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**HR Information** Return to HR Information Menu

General HR information

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**Other Settings / Values** Edit Attributes / Values

**Primary Facility\***

**Employment Status\*** 1379 - Contractual

**Degree Type\*** 2 - Masters Degree



**Eligible For Rehire\*** Eligible for re-hire



**Original Hire Date\*** 1/1/2000



**Retirement Date** None


Click  **Return to HR Information Menu**

**HR Info Editors**

 General HR Attributes  Leave Policy Elections [ None ]

 **Federal Withholding Elections [ None ]**  Benefit Program Elections [ None ]

 State Withholding Elections [ None ]  Additional Allowance Elections [ None ]

 Payment Elections [ Live Check ]


Click  **Federal Withholding Elections**

Black, John S Return to list

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**HR Information** Return to HR Information Menu

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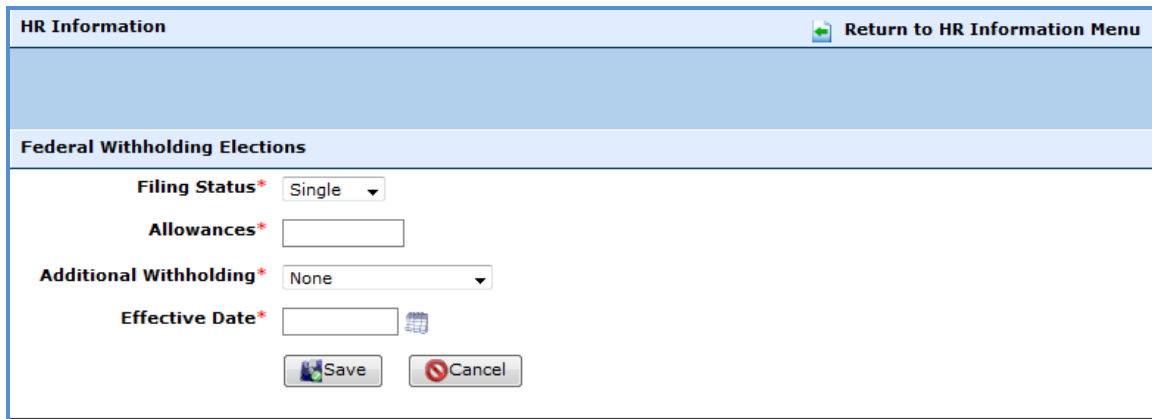
**Federal Withholding Elections**  **Change Election**


Page Size: 10 Filter: Active & Future Elections

System ID	Effective Date	Filing Status	Additional Withholding	Actions
No Federal Withholding Elections Found				

Records: 0 Page 1 of 1

Click  **Change Election**




HR Information  Return to HR Information Menu

**Federal Withholding Elections**

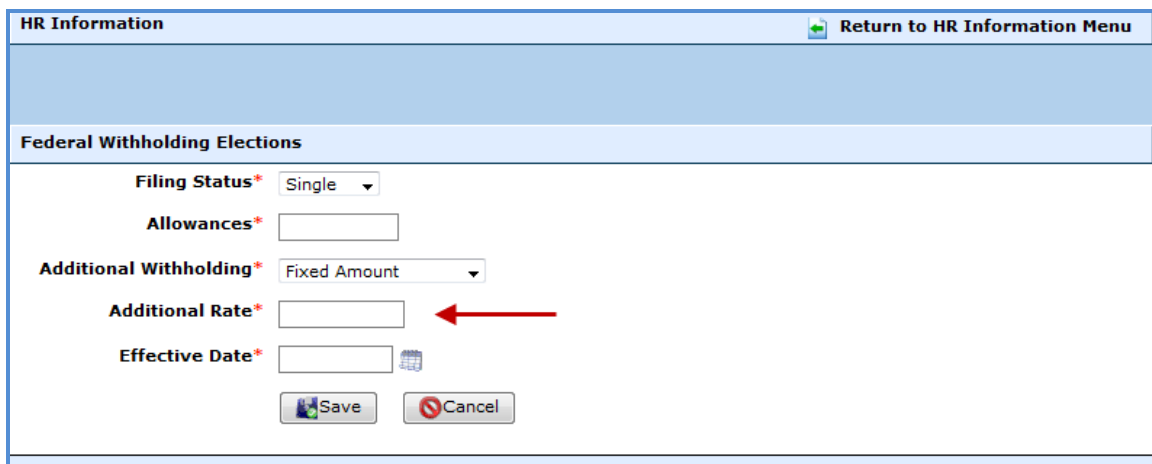
Filing Status\*


Allowances\*

Additional Withholding\*

Effective Date\*  

- ▶ **Filing Status** – Use drop down box to select which tax table (Single or Married) the employee has elected. (<http://www.irs.gov/publications/p15>)
- ▶ **Allowances** – Enter the number allowance the employee has elected on W-4
- ▶ **Additional Withholding** – Use the drop down box to select if employee has requested an additional amount to be deducted for withholding. \*\*If this is selected an additional field will appear on the screen.




HR Information  Return to HR Information Menu


**Federal Withholding Elections**

Filing Status\*

Allowances\*

Additional Withholding\*

Additional Rate\*  

Effective Date\*  

- ▶ **Additional Rate** – Enter the amount or the percentage the employee has requested from their W-4.
- ▶ **Effective Date** – Enter the effective date of the withholding election.

Click  **Save**

HR Information  Return to HR Information Menu

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Federal Withholding Elections  Change Election

Page Size: 10 Filter: Active & Future Elections

System ID	Effective Date	Filing Status	Additional Withholding	Actions
483	2/1/2015	Single - 0 allowance(s)	\$100.00 dollar(s)	

Records: 1 Page 1 of 1

Click **Return to HR Information Menu**

HR Info Editors

- General HR Attributes
- Leave Policy Elections [ None ]
- Federal Withholding Elections [ None ]
- Benefit Program Elections [ None ]
- State Withholding Elections [ None ]**
- Additional Allowance Elections [ None ]
- Payment Elections [ Live Check ]

Click **State Withholding Elections (There is currently no state tax in Texas)**

HR Information  Return to HR Information Menu

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State Withholding Elections  Change Election

Page Size: 10 State: TX Filter: Active & Future Elections

System ID	Effective Date	Filing Status	Additional Withholding	Actions
No State Withholding Elections Found				

Records: 0 Page 1 of 1

Click **Change Election**

HR Information Return to HR Information Menu

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**Federal Withholding Elections**

Filing Status\* Single

Allowances\*

Additional Withholding\* None

Effective Date\*

- ▶ **Filing Status** – Use drop down box to select which tax table the employee has elected.
- ▶ **Allowances** – Enter the number allowance the employee has elected on W-4
- ▶ **Additional Withholding** – Use the drop down box to select if employee has requested an additional amount to be deducted for withholding. \*\*If this is selected an additional field will appear on the screen.

HR Information Return to HR Information Menu

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**Federal Withholding Elections**

Filing Status\* Single

Allowances\*

Additional Withholding\* Fixed Amount

Additional Rate\*

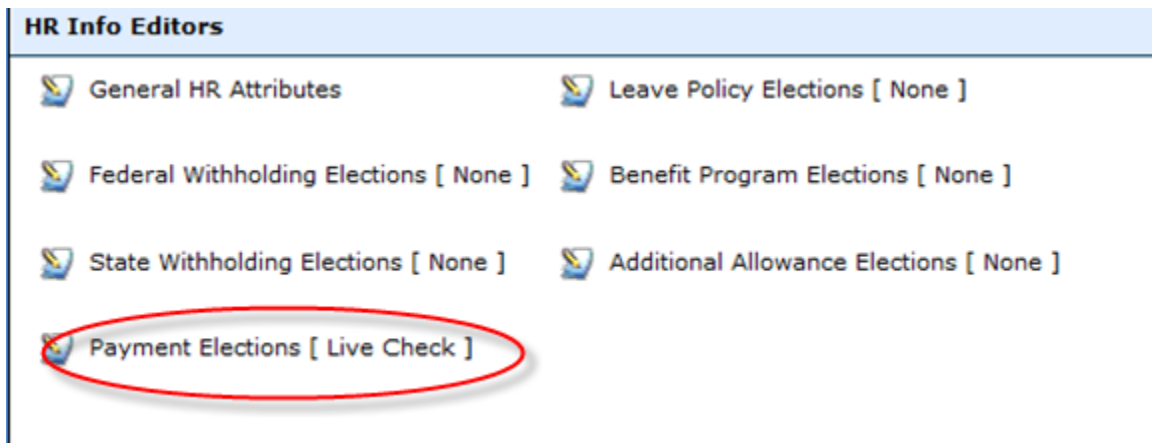
Effective Date\*

- ▶ **Additional Rate** – Enter the amount or the percentage the employee has requested from their W-4.
- ▶ **Effective Date** – Enter the effective date of the withholding election.

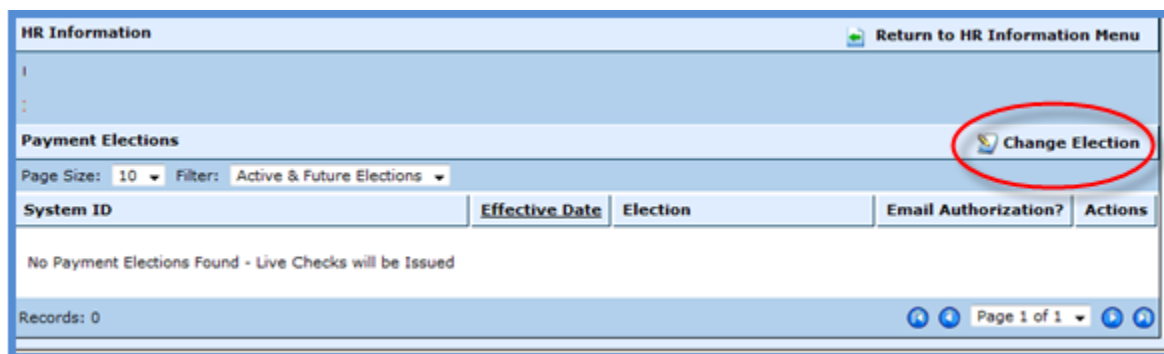
Click Save

Click Return to HR Information Menu

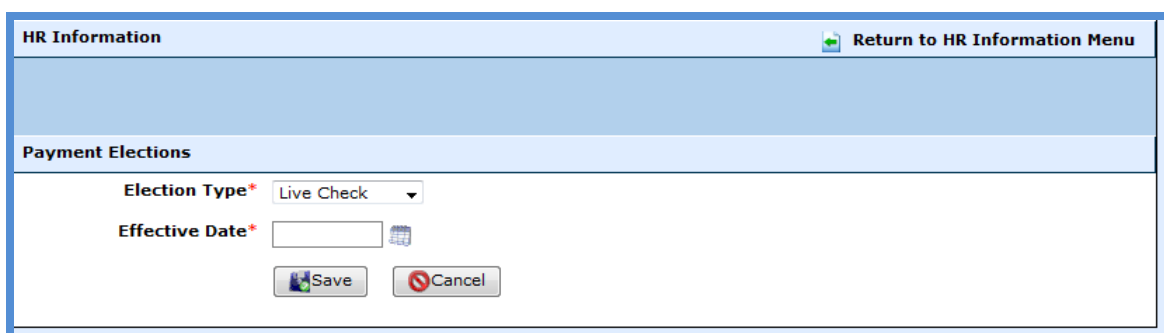




Click  **Payment Elections**



Click  **Change Election**



- ▶ **Election Type** – Select the election type from the drop down box \*\*If direct deposit is selected additional fields will appear on the screen – see below)
- ▶ **Notification** – Select if a notification (check stub) is sent via email to the employee
- ▶ **Effective Date** – Enter the effective date of the payment election

HR Information Return to HR Information Menu

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**Payment Elections**

Election Type\* Direct Deposit ▼

Notification\* Do not perform any notification ▼

Effective Date\*

**Distributions** + Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

Click **Add Distribution (only applicable if Election Type is Direct Deposit)**

HR Information Return to HR Information Menu

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**Payment Elections**

Election Type\* Direct Deposit ▼

Notification\* Do not perform any notification ▼

Effective Date\* 02/01/2015

**Distributions** + Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Percentage ▼	Select a bank....		NOT a Savings Account ▼	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

- ▶ **Distribution Type** - Select the distribution type from the drop down box
- ▶ **Bank** - Select the employee's bank from the drop down box.
- ▶ **Account Number** - Enter the employee's account number for the direct deposit
- ▶ **Checking?** - Select if the account is/is not a savings account.
- ▶ **Rate** - Enter the rate.
  - If distribution type is a percentage then the rate is a percentage. The percentage HAS to equal 100%.
  - If distribution type is a flat amount then the rate is a dollar amount.

HR Information Return to HR Information Menu

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**Payment Elections**

Election Type\* Direct Deposit

Notification\* Do not perform any notification

Effective Date\* 2/1/2015

**Distributions** + Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Percentage	063000047 - BANK OF AMERICA - 063000047	123456	NOT a Savings Account	100.00

Save Cancel

Click  Save

\*\*If employee elected to have a flat amount sent to one bank and the remainder sent to a separate bank, see below:

HR Information Return to HR Information Menu

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**Payment Elections**

Election Type\* Direct Deposit

Notification\* Do not perform any notification

Effective Date\* 2/1/2015

**Distributions** + Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Flat Amount	063000047 - BANK OF AMERICA - 063000047	123456	NOT a Savings Account	500.00
2	Percentage	311989807 - 1ST UNIVERSITY CREDIT UNION	234567	Savings Account	100.00

Save Cancel

Flat amount

Use 100% for remaining of the check

Click  Return to HR Information Menu

**HR Info Editors**

- General HR Attributes
- Leave Policy Elections [ None ]
- Federal Withholding Elections [ None ]
- Benefit Program Elections [ None ]
- State Withholding Elections [ None ]
- Additional Allowance Elections [ None ]
- Payment Elections [ Live Check ]

Click **Leave Policy Elections**

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

**Black, John W** [Return to list](#)

**HR Information** [Return to HR Information Menu](#)

Use this editor to change the status of an employee's leave policy elections. Change status will update the election effective the date you provide.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **8/16/2014**

**Leave Policy Elections** [Change Election](#)

Page Size: 10 Filter: Active & Future Elections

System ID	Effective Date	Policy	Actions
No Leave Policy Elections Found			

Click **Change Election**

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

**Black, John W** [Return to list](#)

**HR Information** [Return to HR Information Menu](#)

Use this editor to change the status of an employee's leave policy elections. Change status will update the election effective the date you provide.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **8/16/2014**

**Leave Policy Elections**

Select a policy...  
Non Eligible  
**Standard**

**Leave Policy\***

**Effective Date\*** 08/16/2014

[Save](#) [Cancel](#)

- ▶ **Leave Policy** – Select the appropriate leave policy from the drop down box
- ▶ **Effective Date** – Enter the effective date of the leave policy

Click Save

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

[Return to list](#)

**HR Information** [Return to HR Information Menu](#)

Use this editor to change the status of an employee's leave policy elections. Change status will update the election effective the date you provide.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **3/28/2015**

**Leave Policy Elections**

Page Size: 10 Filter: Active & Future Elections

System ID	Effective Date	Policy	Actions
275	8/19/2013	Standard	Locked

Records: 1

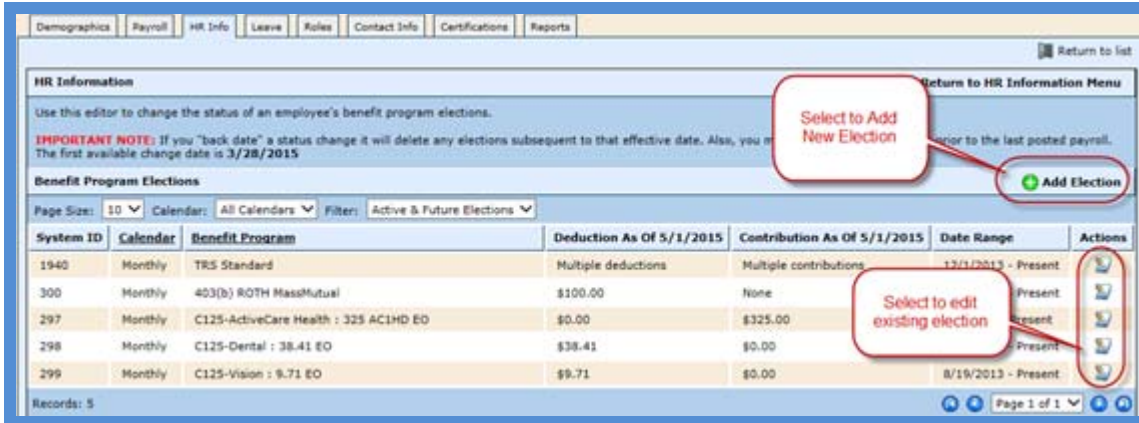
Page 1 of 1

Click **Return to HR Information Menu**

## HR Info Editors

- General HR Attributes
- Federal Withholding Elections [ None ]
- State Withholding Elections [ None ]
- Payment Elections [ Live Check ]
- Leave Policy Elections [ None ]
- Benefit Program Elections [ None ]**
- Additional Allowance Elections [ None ]

Click  **Benefit Program Elections**



Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

Return to list

Return to HR Information Menu

Use this editor to change the status of an employee's benefit program elections.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you must make changes prior to the last posted payroll. The first available change date is 3/28/2015

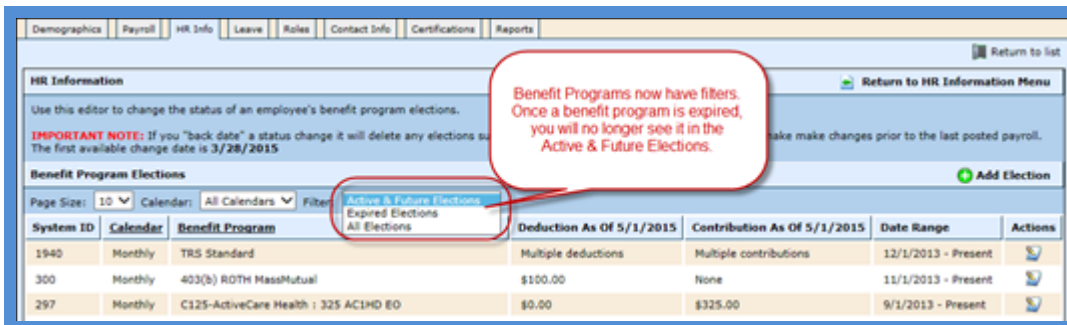
Benefit Program Elections

Page Size: 10 | Calendar: All Calendars | Filter: Active & Future Elections

System ID	Calendar	Benefit Program	Deduction As Of 5/1/2015	Contribution As Of 5/1/2015	Date Range	Actions
1940	Monthly	TRS Standard	Multiple deductions	Multiple contributions	12/1/2013 - Present	
300	Monthly	403(b) Roth MassMutual	\$100.00	None	Present	
297	Monthly	C125-ActiveCare Health : 325 AC1HD EO	\$0.00	\$325.00	Present	
298	Monthly	C125-Dental : 38.41 EO	\$38.41	\$0.00	Present	
299	Monthly	C125-Vision : 9.71 EO	\$9.71	\$0.00	8/19/2013 - Present	

Records: 5

Page 1 of 1



Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

Return to list

Return to HR Information Menu

Use this editor to change the status of an employee's benefit program elections.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you must make changes prior to the last posted payroll. The first available change date is 3/28/2015

Benefit Program Elections

Page Size: 10 | Calendar: All Calendars | Filter: **Active & Future Elections**

System ID	Calendar	Benefit Program	Deduction As Of 5/1/2015	Contribution As Of 5/1/2015	Date Range	Actions
1940	Monthly	TRS Standard	Multiple deductions	Multiple contributions	12/1/2013 - Present	
300	Monthly	403(b) Roth MassMutual	\$100.00	None	11/1/2013 - Present	
297	Monthly	C125-ActiveCare Health : 325 AC1HD EO	\$0.00	\$325.00	9/1/2013 - Present	

Click  **Add Election**

HR Information Return to HR Information Menu

---

**Benefit Program Elections**

Benefit Program\*

Calendar\*

Effective Date\*

Expiration Date

- ▶ **Benefit Program** – Select a benefit program from the drop down box
- ▶ **Calendar** – Select a calendar for the benefit program.
- ▶ **Effective Date** – Enter the effective date of the benefit program.
- ▶ **Expiration Date** – Enter the expiration date of the benefit program if applicable.

HR Information Return to HR Information Menu

---

**Benefit Program Elections**

Benefit Program\*

Calendar\*

Effective Date\*

Expiration Date

Click Save (see below for more benefit plan setting options)

HR Information Return to HR Information Menu

---

**Benefit Program Elections** Add Election

Page Size: 10 | Calendar: All Calendars | Filter: Active & Future Elections

System ID	Calendar	Benefit Program	Deduction As Of 2/10/2015	Contribution As Of 2/10/2015	Date Range	Actions
1387	Monthly Payroll	Employee Stipends	Multiple deductions	None	2/1/2015 - Present	

Records: 1 Page 1 of 1

\*\*\*If the benefit program was set up with a calculation method of subscription based, offering, or election based, the screen will appear as below:

**\*Flat Amount or Percentage**

- **Calculation Method** - Select if the benefit program is a flat amount or % of earnings
- **Rate** – Enter the rate or the percentage.

HR Information		Return to HR Information Menu
<b>Benefit Program Elections</b>		
Benefit Program*	UNCOLLECTED TRS-CARE CONTRIBUTION 3/7 & 3/24/14	
Calendar*	Select a calendar.....	
Effective Date*	<input type="text"/>	
Expiration Date	<input type="text"/>	
<b>Deduction Calculations</b>		
Calculation Method*	Flat Amount	
Rate*	<input type="text"/>	
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

- ▶ **Benefit Program** – Select the benefit program from the drop down box
- ▶ **Calendar** – Select a calendar for the benefit program.
- ▶ **Effective Date** – Enter the effective date of the benefit program.
- ▶ **Expiration Date** – Enter the expiration date of the benefit program if applicable.
- ▶ **Calculation Method** - Select if the benefit program is a flat amount or % of earnings
- ▶ **Rate** – Enter the rate or the percentage .

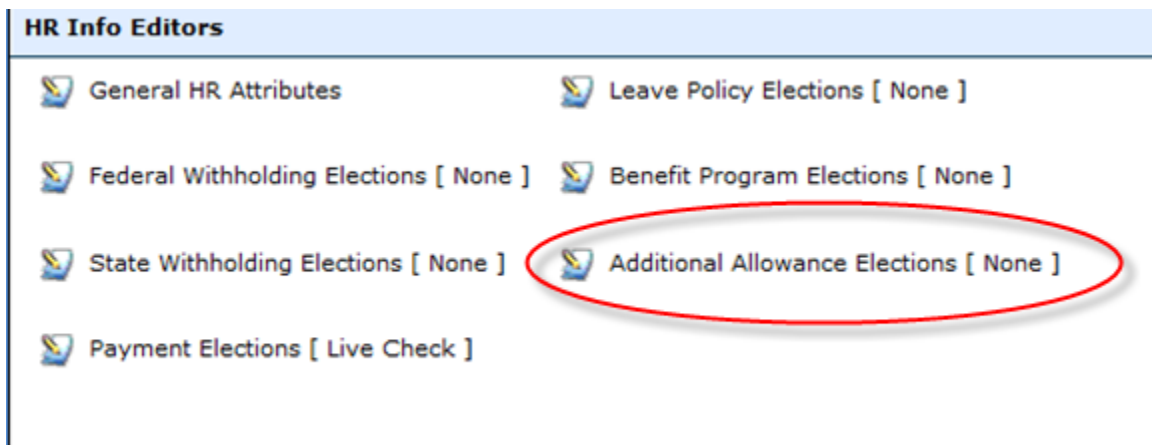
**\*Offering**

HR Information		Return to HR Information Menu
<b>Benefit Program Elections</b>		
Benefit Program*	14/15-SCOTT & WHITE (C125)	
Calendar*	Select a calendar.....	
Effective Date*	<input type="text"/>	
Expiration Date	<input type="text"/>	
<b>Offering Selection</b>		
Offering*	S&W-E/C	
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>








- ▶ **Benefit Program** – Select the benefit program from the drop down box
- ▶ **Calendar** – Select a calendar for the benefit program.
- ▶ **Effective Date** – Enter the effective date of the benefit program.
- ▶ **Expiration Date** – Enter the expiration date of the benefit program if applicable.
- ▶ **Offering** – Select the appropriate offering for the employee.



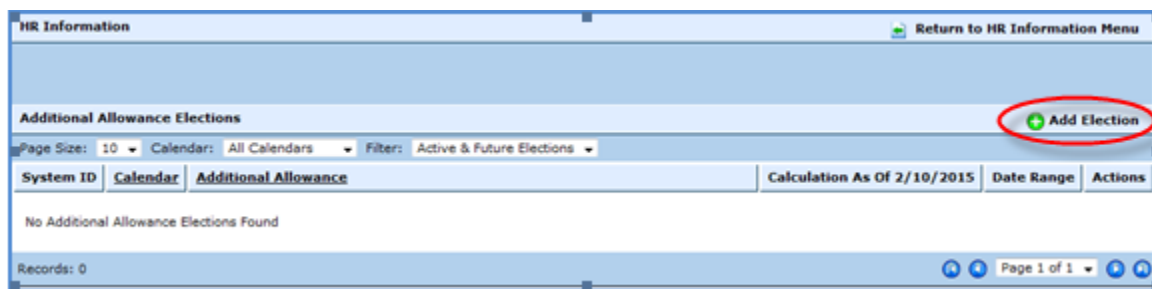
Click  **Return to HR Information Menu**




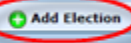
**HR Info Editors**

-  General HR Attributes
-  Leave Policy Elections [ None ]
-  Federal Withholding Elections [ None ]
-  Benefit Program Elections [ None ]
-  State Withholding Elections [ None ]
-  **Additional Allowance Elections [ None ]**
-  Payment Elections [ Live Check ]

Click  **Additional Allowance Elections**



**HR Information**  Return to HR Information Menu

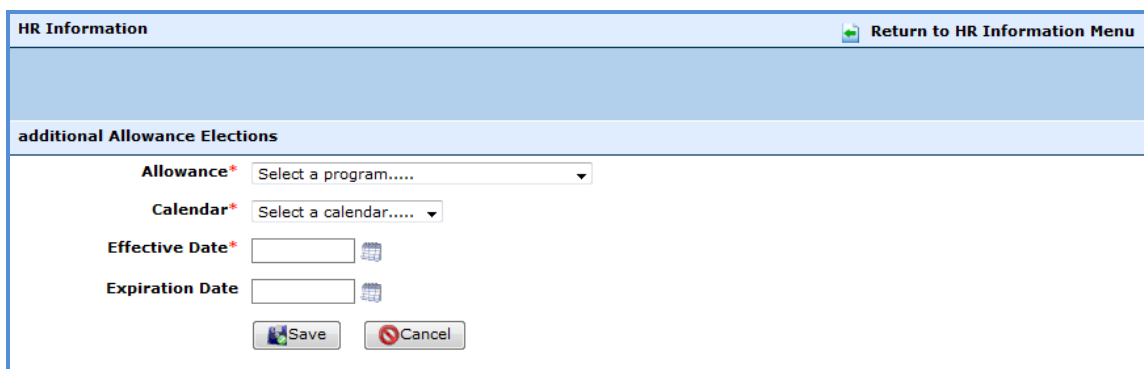
**Additional Allowance Elections** 


Page Size: 10 | Calendar: All Calendars | Filter: Active & Future Elections

System ID	Calendar	Additional Allowance	Calculation As Of 2/10/2015	Date Range	Actions
No Additional Allowance Elections Found					

Records: 0 Page 1 of 1

Click  **Add Election**





**HR Information**  Return to HR Information Menu

**additional Allowance Elections**

**Allowance\***

**Calendar\***

**Effective Date\***  

**Expiration Date**  

- ▶ **Allowance** - Select the allowance from the drop down box. These are preset allowances that were set up in WebSmart at Finance > Payroll > Add'l Allowances
- ▶ **Calendar** – Select a calendar for the additional allowance.
- ▶ **Effective Date** – Enter the effective date of the additional allowance
- ▶ **Expiration Date** – Enter the expiration date of the additional allowance if applicable.

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports Return to list

**HR Information** Return to HR Information Menu

Use this editor to change the status of an employee's additional allowance elections.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **3/28/2015**

**additional Allowance Elections**

**Allowance\*** Cell Phone Allowance

**Calendar\*** Monthly

**Effective Date\*** 04/01/2015

**Expiration Date**

Click  **Save**

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports Return to list

**HR Information** Return to HR Information Menu

Use this editor to change the status of an employee's additional allowance elections.

**IMPORTANT NOTE:** If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **8/16/2014**

**additional Allowance Elections**

**Allowance\*** Cell Phone Allowance

**Calendar\*** Monthly

**Effective Date\*** 04/01/2015

**Expiration Date** 08/31/2015

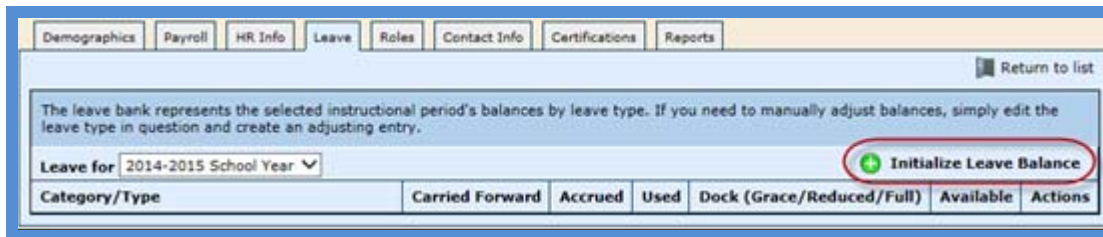
Click  **Return to HR Information Menu**

# Payroll - Add Leave

Finance > HR > Staff Manager

The leave bank represents the selected instructional period's balances by leave type. If you need to manually adjust balances, simply edit the leave type in question and create an adjusting entry.

 Initialize Leave Balance/Edit Leave Balance



Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

Return to list

The leave bank represents the selected instructional period's balances by leave type. If you need to manually adjust balances, simply edit the leave type in question and create an adjusting entry.

Leave for: 2014-2015 School Year

**+ Initialize Leave Balance**

Category/Type	Carried Forward	Accrued	Used	Dock (Grace/Reduced/Full)	Available	Actions
---------------	-----------------	---------	------	---------------------------	-----------	---------

Click  Initialize Leave Balance



Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

Return to list

If you need to create a carry forward balance for a new employee, make sure you are initializing the balance for the PRIOR school year.

**Initialize Leave Balance**

Leave Type\* State Personal

Balance\*

**Save** **Cancel**

Leave Blank


- ▶ **Leave** - Select the leave that is being adjusted.
- ▶ **Balance** - Leave the balance blank

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports	
--------------	---------	---------	-------	-------	--------------	----------------	---------	--

Return to list

The leave bank represents the selected instructional period's balances by leave type. If you need to manually adjust balances, simply edit the leave type in question and create an adjusting entry.

Leave for: 2014-2015 School Year + Initialize Leave Balance

Category/Type	Carried Forward	Accrued	Used	Dock (Grace/Reduced/Full)		Available	Actions
State Personal	0.00	0.00	0.00	0.00	0.00	0.00	

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports	
--------------	---------	---------	-------	-------	--------------	----------------	---------	--

Return to list

**Leave Detail for State Personal** Return to Leave Balances

Some description here

**Leave Transaction**

Comments\*

Units Accrued\*

Units Used\*

**Dock Related Balances**

Graced\*

Units Reduced\*

Units Full\*

Click  Save

**\*\*\*Continue the same process for all the leave that needs to be initialized. For instance, if an employee is eligible for local leave, vacation, etc you will initialize those leave types now.**

 Adjustment to Leave

- ▶ To add an adjustment to correct leave, you can enter a correction through a leave form, or you can add the adjustment on the Leave tab
- ▶ **Select Add Adjustment**

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports	Return to list
<b>Leave Detail for State Personal</b>								Return to Leave Balances
Some description here								
								<b>+ Add Adjustment</b>
Page Size: 10								
System ID	Txn Type	Comments	Accrued	Used	Graced	Reduced Dock	Full Dock	Actions
5125	Adjustment	Initial Accrual	5.00	0.00	0.00	0.00	0.00	
Records: 1								
Page 1 of 1								

- ▶ **Comments** – enter any comments to help you identify the leave
- ▶ **Units Used** – enter a negative leave amount to adjust the leave. In this example, we chose to reimburse 1 day of leave.
- ▶ **Save**

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports	Return to list
<b>Leave Detail for State Personal</b>								Return to Leave Balances
Some description here								
<b>Leave Transaction</b>								
<b>Comments*</b>	<input type="text" value="Reimburse Leave 02/23"/>							
<b>Units Accrued*</b>	<input type="text" value="0.00"/>							
<b>Units Used*</b>	<input type="text" value="-1.00"/>							
<b>Dock Related Balances</b>								
<b>Graced*</b>	<input type="text" value="0.00"/>							
<b>Units Reduced*</b>	<input type="text" value="0.00"/>							
<b>Units Full*</b>	<input type="text" value="0.00"/>							
<input type="button" value="Save"/> <input type="button" value="Cancel"/>								

**Employee Leave report** – after entering the leave adjustment, you will be able to see it on the Employee Leave report

Contract: 08/21/2014 - 06/05/2015						
State Personal						
	2014-2015 Leave		5.00	0.00	0.00	0.00
	Reimburse Leave 02/23		0.00	-1.00	0.00	0.00
<b>b State Personal Balance</b>		<b>0.00</b>	<b>5.00</b>	<b>-1.00</b>	<b>0.00</b>	<b>6.00</b>



### Leave – Service Record Adjustment

- Select the previous year. In this example, 2013-2014
- Select edit

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports		
								Return to list	
The leave bank represents the selected instructional period's balances by leave type. If you need to manually adjust balances, simply edit and create an adjusting entry.									
Leave for		2014-2015 School Year							Initialize Leave Balance
		2015-2016 School Year							
		<b>2013-2014 School Year</b>							
		2012-2013 School Year							
Category/			Carried Forward	Accrued	Used	Dock (Grace/Reduced/Full)		Available	Actions
State Pers		2010-2011 School Year	0.00	5.00	0.00	0.00	0.00	5.00	
		2009-2010 School Year							

### Select Add Adjustment

Demographics	Payroll	HR Info	Leave	Roles	Contact Info	Certifications	Reports	
								Return to list
<b>Leave Detail for State Personal</b>								Return to Leave Balances
Some description here								
								<b>Add Adjustment</b>
Page Size: 10								

- Enter Comments
- Units Accrued – enter the amount from the employee's service record
- Save

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

Return to list

**Leave Detail for State Personal** [Return to Leave Balances](#)

Some description here

**Leave Transaction**

Comments\*

Units Accrued\*

Units Used\*

**Dock Related Balances**

Graced\*

Units Reduced\*

Units Full\*

- ▶ To verify the Carry Forward amount:
  - Select Return to Leave Balances
  - Select the Current Year

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Reports

Return to list

The leave bank represents the selected instructional period's balances by leave type. If you need to manually adjust balances, simply edit the leave type in question and create an adjusting entry.

Leave for  [+ Initialize Leave Balance](#)

Category/Type	Carried Forward	Accrued	Used	Dock (Grace/Reduced/Full)			Available	Actions
State Personal	5.00	5.00	-1.00	0.00	0.00	0.00	11.00	

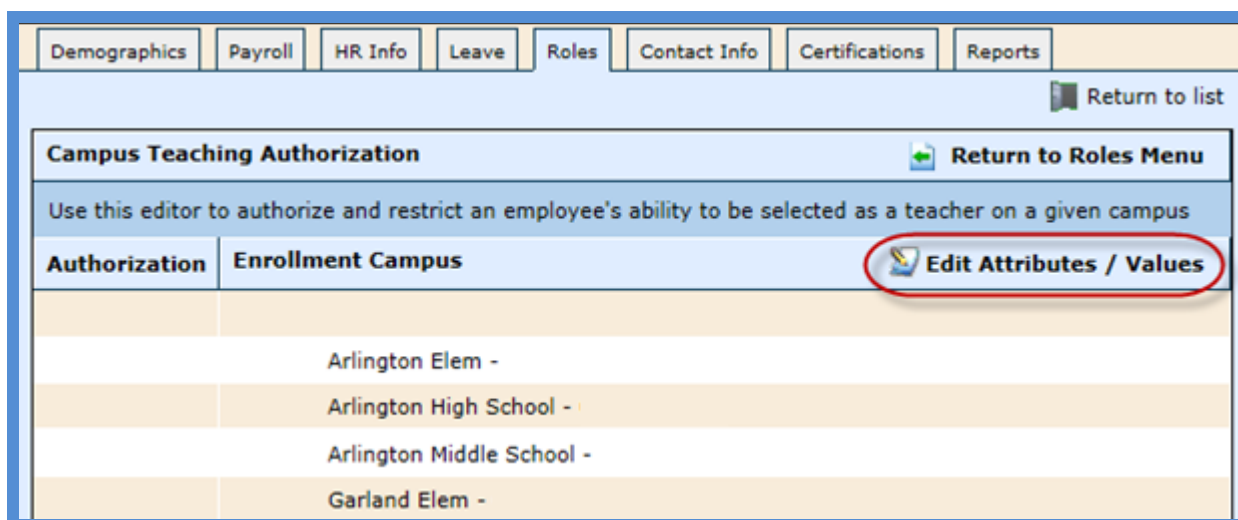
# Payroll - Roles

Finance > HR > Staff Manager > Roles

- ▶ **Roles are used to identify the campus and responsibilities of staff for PEIMS reporting purposes and access to Gradebook.**
  - **Teaching Campuses** - Use this editor to authorize and restrict an employee's ability to be selected as a teacher on a given campus
  - **Responsibilities** – Use this editor to assign responsibilities for staff, which creates 090 records (Staff Data Responsibilities) for PEIMS reporting in the Fall PEIMS file.



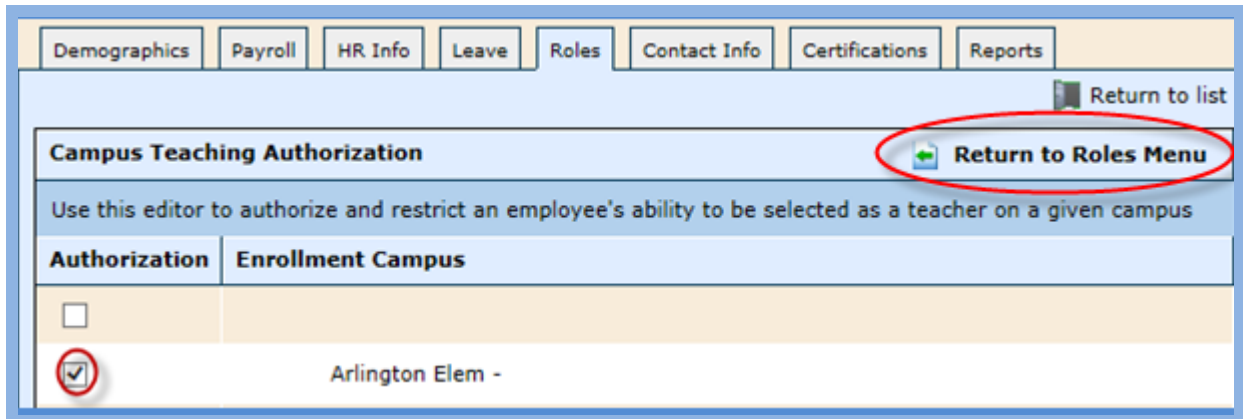
- ▶ Select **Teaching Campuses**
  - Select **Edit Attributes/Values** to assign a staff member to a campus or multiple campuses
  - Assigning teachers to specific campuses will release the teacher to the scheduler module



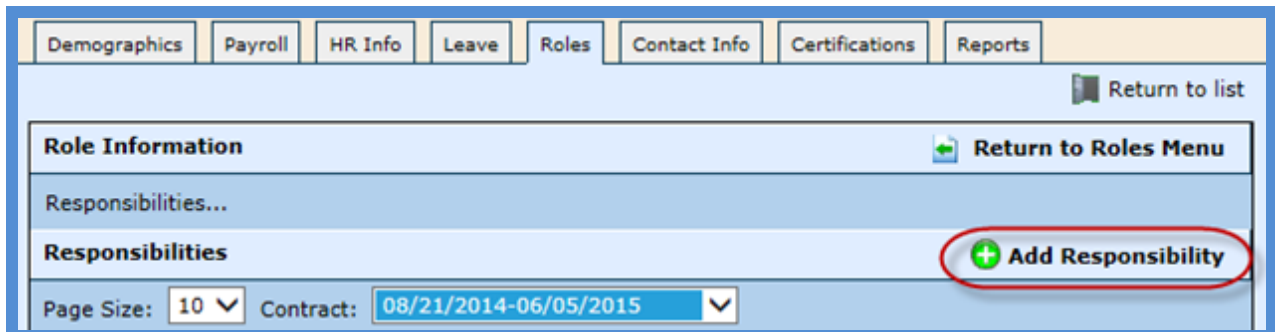
- ▶ **Check** the box for each campus to assign to the staff
- ▶ Select **Save**



▶ **Return to Roles Menu**



- ▶ **Responsibilities** – Teacher responsibilities will be released from the schedule module during the PEIMS process. You will need to add responsibilities for all other PEIMS reportable staff. See the PEIMS Data Standards page for further clarification. [Click Here](#)
- ▶ Select **Add Responsibilities**



Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

Return to list

**Role Information** [Return to Roles Menu](#)

Responsibilities...

**Responsibilities**

**Campus Number\*** 701 - Superintendent

**Role Type\*** 027 - Superintendent/Chief

**State Service ID\*** SS013000 - General Administration

**Instructional Setting\*** 80 - Regular Class

**Population Served\*** 01 - Regular Students

**Class Type\*** 01 - Regular

**Minutes\*** 0

- ▶ Select to edit the role responsibility
- ▶ Select to delete the role responsibility

Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

Conger, Edward G [Return to list](#)

**Role Information** [Return to Roles Menu](#)

Responsibilities...

**Responsibilities**

Page Size: 10 Contract: 08/01/2014-07/31/2015

System ID	Campus Number	Role Type	St	Actions
380	057848701	027 - Superintendent/Chief Administrative Officer/Chief E	SS013000	0 <input type="button" value="Edit"/> <input type="button" value="Delete"/>
505	057848701	027 - Superintendent/Chief Administrative Officer/Chief E	SS013000	0 <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Records: 2

Page 1 of 1

## Payroll - Contact Info

Finance > HR > Staff Manager

 Enter Contact Info

Demographics	Payroll	HR Info	Leave	Contact Info	Certifications	Documents	Reports
--------------	---------	---------	-------	--------------	----------------	-----------	---------

**Black, John S** Return to list

This view allows you to edit contact information related to the employee.

**Employee Contact Info** Edit Contact Info

**Mailing Address**

**Home Phone** None

**Cell Phone** None

**Work Phone** None

**Primary Email** None

**Alternate Email** None

**Emergency Contact 1** None

**Emergency Contact 2** None

Click  **Edit Contact Info**

**Black, John S** Return to list

This view allows you to edit contact information related to the employee.

**Employee Contact Info**

**Mailing Address**

**Street Line 1**

**City/State/ZIP**  TX

**Home Phone**

**Cell Phone**

**Work Phone**

**Primary Email**

**Alternate Email**

**Emergency Contact 1**  /  /

**Emergency Contact 2**  /  /

► **Mailing Address** – Enter the following:

- Street Line 1
- City/State/Zip

**Home Phone**

**Cell Phone**

**Work Phone**

Click on the radial button to indicate the primary contact source.

- Primary Email

- Alternate Email
- Emergency Contact 1
- Emergency Contact 2

This view allows you to edit contact information related to the employee.

**Employee Contact Info**

**Mailing Address**

**Street Line 1**

**City/State/ZIP**

**Home Phone**

**Cell Phone**

**Work Phone**

**Primary Email**


**Alternate Email**

**Emergency Contact 1**  /  /

**Emergency Contact 2**  /  /

Click  Save

This view allows you to edit contact information related to the employee.

**Employee Contact Info**  **Edit Contact Info**

**Mailing Address** 12345 Street Name City, TX 76710

**Home Phone** (254) 759-1902 \*

**Cell Phone** (254) 749-1112

**Work Phone** (254) 759-0003

**Primary Email** jblack@school.net

**Alternate Email** None

**Emergency Contact 1** spouse / (254) 759-2345

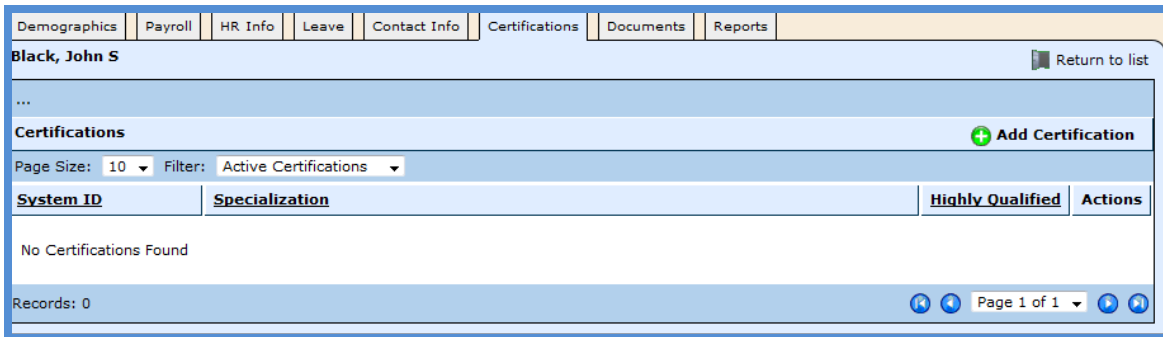
**Emergency Contact 2** None

# Payroll - Certifications

The areas in which an employee is eligible to teach are based on the certification source. The current list of specialization certifications listed on this screen are preloaded SBOE's list of endorsements available to date.

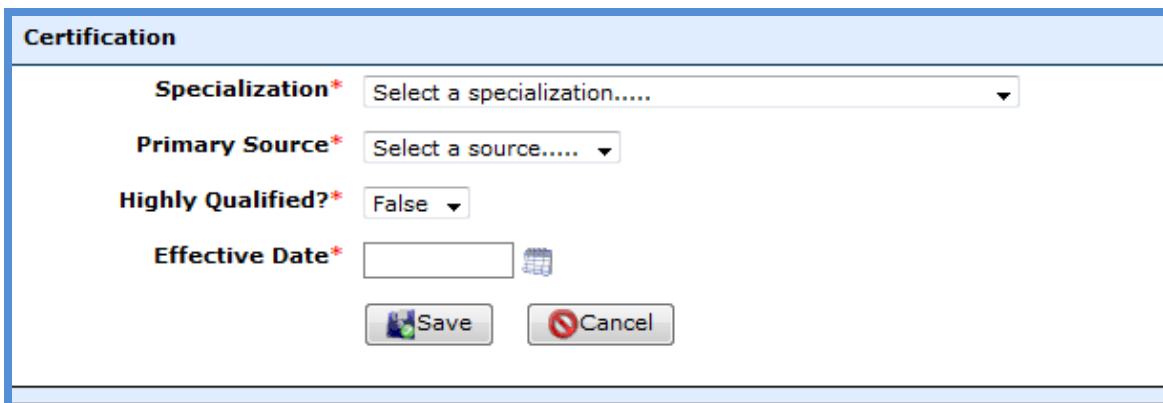
Finance > HR > Staff Manager

 Adding Certifications



The screenshot shows a web application interface for managing certifications. At the top, there are tabs for Demographics, Payroll, HR Info, Leave, Contact Info, Certifications (selected), Documents, and Reports. Below the tabs, the user's name "Black, John S" is displayed, along with a "Return to list" link. The main section is titled "Certifications" and includes a "+ Add Certification" button. Below this, there are controls for "Page Size: 10" and "Filter: Active Certifications". A table header is visible with columns for "System ID", "Specialization", "Highly Qualified", and "Actions". The table content shows "No Certifications Found". At the bottom, it indicates "Records: 0" and "Page 1 of 1".

Click  Add Certification



The screenshot shows the "Certification" form. It contains the following fields:

- Specialization\***: A dropdown menu with the text "Select a specialization....."
- Primary Source\***: A dropdown menu with the text "Select a source....."
- Highly Qualified?\***: A dropdown menu with the value "False"
- Effective Date\***: A text input field with a calendar icon to its right.

At the bottom of the form are two buttons: "Save" and "Cancel".

- ▶ **Specialization** – Select a specialization from the drop down menu. This will be on the employee’s teaching certificate.
- ▶ **Primary Source** – Select the source of the specialization from the drop down menu
  
- ▶ **Highly Qualified** – Select if the employee is highly qualified based on the following [Click here for HQ requirements](#)
  
- ▶ **Effective Date**– Enter the effective date of the certification.

**Certification**

**Specialization\*** English Language Arts and Reading 4 - 8

**Primary Source\*** SBEC

**Highly Qualified?\*** True

**Effective Date\*** 02/01/2015

Click  Save



**Black, John S** Return to list

---

...

**Certifications** + Add Certification

Page Size: 10 Filter: Active Certifications

System ID	Specialization	Highly Qualified	Actions
3	English Language Arts and Reading 4 - 8	★ True	 

Records: 1 Page 1 of 1

**Highly Qualified – True or False** - once the determination is made on the HQ status of an employee, the prompt will show “True.” If at any point, the status needs to be False, click on the yellow star to indicate False.

**To expire a certification** – if an employee’s certification has expired, select the edit button to go to the next screen.

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

Black, John W Return to list

...

**Certifications**

Page Size: 10 Filter: Active Certification

System ID	Specialization	Highly Qualified	Actions
6	Generalist 4 -8	★ True	

Records: 1 Page 1 of 1

*Annotations:*  
 - Select the star if the employee is NOT highly qualified (points to the star icon)  
 - Select edit to enter an expiration date (points to the edit icon)

**Expiration Date** – enter the expiration date of the certification  
 Select **Save**

Demographics Payroll HR Info Leave Roles Contact Info Certifications Reports

Black, John W Return to list

**Certification : Generalist 4 -8** Return to Certification List

....

**Certification Details**

Certification Source\* SBEC

Effective Date\* 5/1/2014

Expiration Date\*

Comments

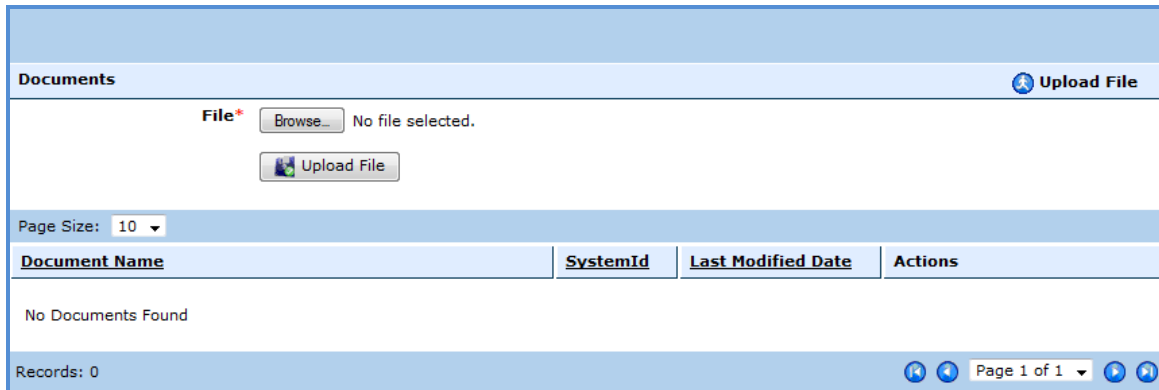
# Payroll - Documents


Finance > HR > Staff Manager

 Adding Documents


- ▶ Documents – if you have purchased WebSmart-*i*, you will see a Documents tab and have the ability to upload the personnel file here.
- ▶ You are allowed to upload documents of any size.

Click on  Upload File



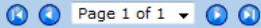
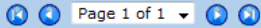
Documents  Upload File

File\*  No file selected.

 Upload File

Page Size: 10 ▾

Document Name	SystemId	Last Modified Date	Actions
No Documents Found			

Records: 0  Page 1 of 1 ▾ 

Click  to find document to upload.

Click



Demographics | Payroll | HR Info | Leave | Roles | Contact Info | Certifications | Documents | Reports

**Black, John W** Return to list

Documents Upload File

Page Size: 10

Document Name	Last Name	First Name	SSN/Student ID	Date of Birth	Actions
<u>\$item.OriginalFileName</u>	Black	John	123-45-6789	1/1/1970	

Records: 1 Page 1 of 1

# Payroll - Reports

Finance > HR > Staff Manager

 Reports

- ▶ **Reports** – You now have access to many reports from the employee’s HR screen.
- ▶ Select any report and complete the parameters
- ▶ Select **Run Report**.
- ▶ New Reports –
  - Employee Payroll Preview – this was previously found on the employee’s Position History screen
  - Staff Certifications – lists all certifications for that staff member

- ▶ **Instructional Period** – Select the instructional period from the drop down box
- ▶ **Payroll Calendar** – Select the pay calendar from the drop down box
- ▶ **Payroll Period** – Select the payroll period from the drop down box
- ▶ **ID Type** – Select the ID type desired on the payroll report. (only generated on some of the reports).

- ▶ **Export Data to Excel** – Check this box if you want the report run to Excel

Click  **Run Report**