HR STAFF MANAGER

WebSmart is the industry's leading software that is a secure, flexible, Web browser-based, integrated package that provides any size school with the tools and growth necessary to track students and business office functions.

Finance Business Software

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Chapter 1
Getting Started & Helpful Hints

The Staff Manager section of the HR Module will allow you to quickly and easily set up new employees, as well as keep your current employees' information up-to-date.

Before adding an employee to WebSmart, check the TRAQS site shown below to verify their TRS status. Enter the name in WebSmart *exactly* as listed with TRAQS if they are a current member. Otherwise, enter their name as listed on Social Security card, including full middle name.

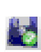
https://oapi.trs.state.tx.us/TRAQS/do/loginPage

- ✓ Once you begin the new employee set up, it is important to complete the process as one action to ensure everything is entered in the proper sequence to avoid potential error messages.
- ✓ At the beginning of each section, you will be given the path (shown in *italics*) that will guide you to the correct place in WebSmart to begin adding, editing or deleting information for that section.
- ✓ Throughout WebSmart you will see a series of icons. These icons perform the same function in each section. Becoming familiar with these icons will enable you to navigate and work efficiently in WebSmart.

Commonly Used Icons

 **Add -** Allows you to add or search

 **Edit** - Allows you to edit that item

 **Create** - Creates or Saves

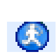
 **Back** - Goes Back to a key location (as noted next to the icon)

 **Search -** Shows you all the items that are in that particular area

 **Run** - Runs a report

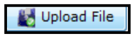
 **Terminate** - Terminates, Cancels or Voids an action

 **Delete** – Deletes an Item

 **Upload –** Starts the process to upload your documents

Promote – Promotes or moves items designated year

Browse – Allows you to select the file you want to upload



Upload File – saves the file to WebSmart

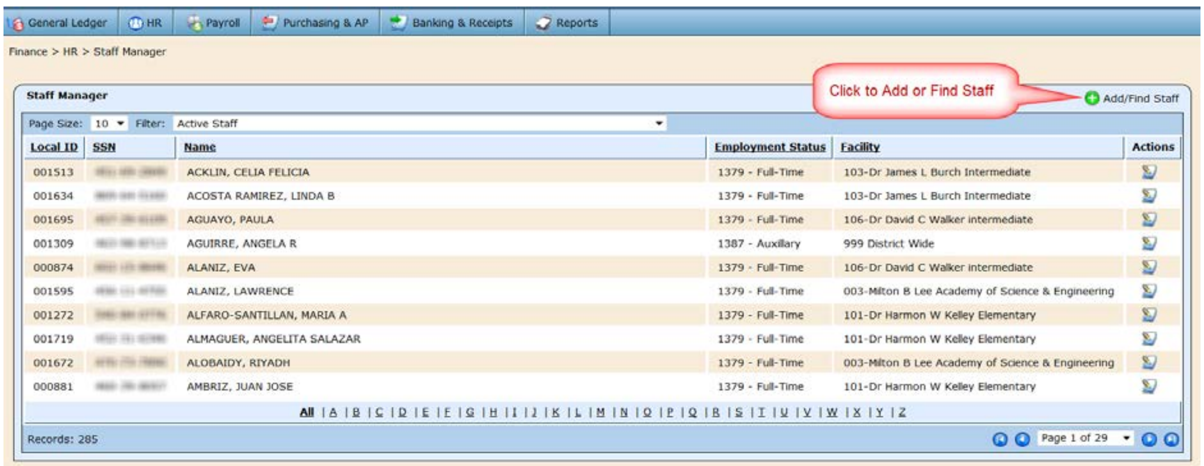
Run Report – begins running the requested report

Search for an Existing Employee

Finance *> HR > Staff Manager*

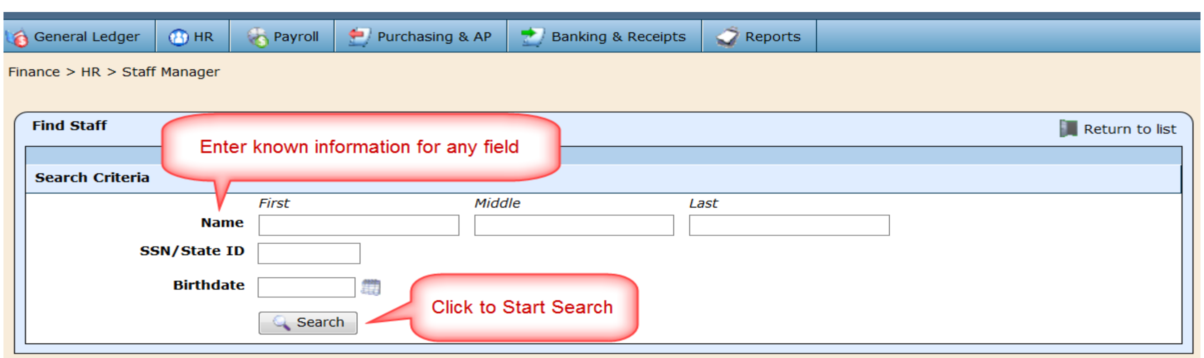
To locate an employee, you may either click on the letter of their last name at the bottom of the screen or use the search feature.

To use the search feature click on **Add/Find Staff**



Complete Search Criteria by entering the known information in one or more of the fields:

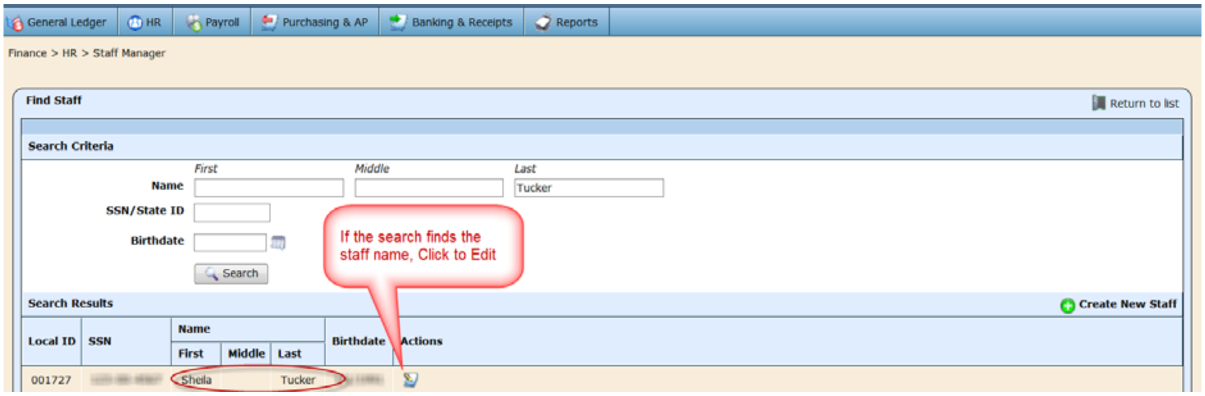
Click **Search**



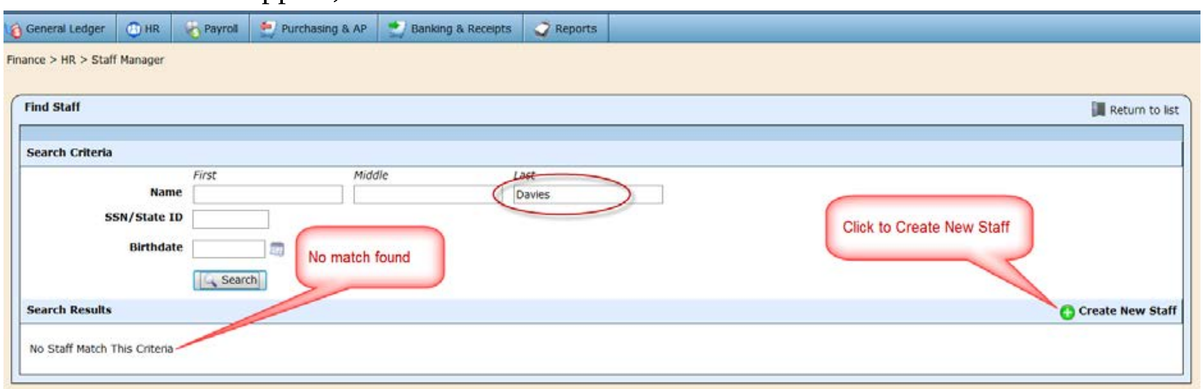
- **Name -**   First, Middle, Last
- **SSN/State ID -** Enter the Social Security Number of the Employee
- **Birthdate -** Enter the Birthdate of the Employee

If their name appears, as shown below, they are currently in the system.

Click to edit their information.



If their name does **not** appear, click **Create New Staff.**



Chapter 2
Staff Manager

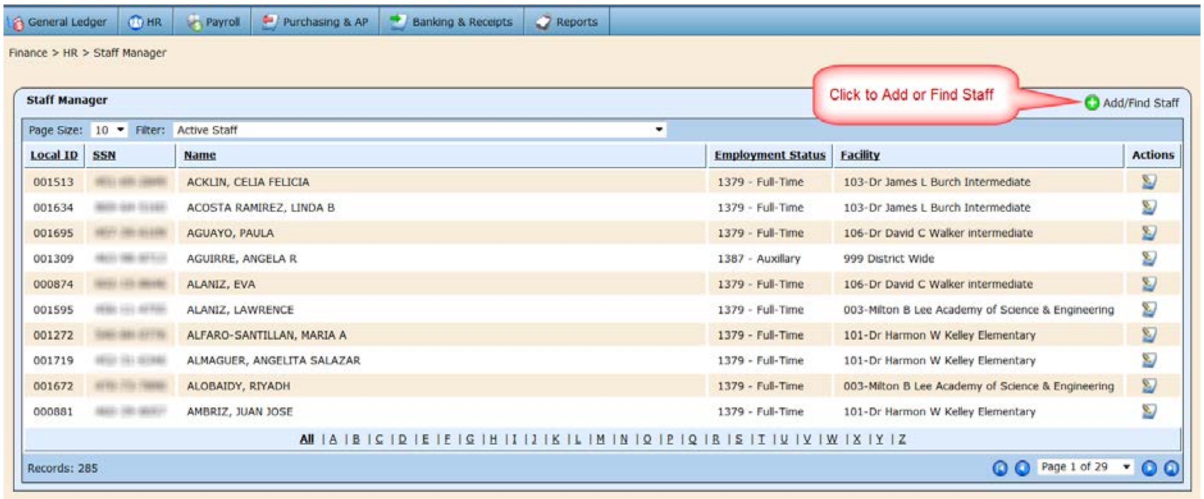
Step 1 - Demographics

Add/Edit Information

Finance *> HR > Staff Manager*

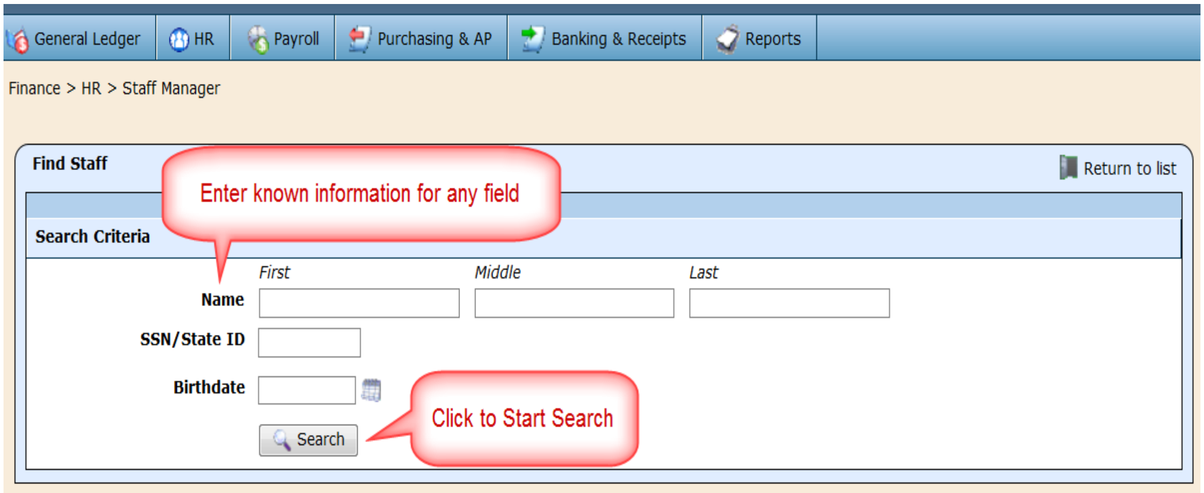
To locate an employee, you may either click on the letter of their last name at the bottom of the screen or use the search feature.

To add or edit information, use the search feature by clicking on **Add/Find Staff**



Complete Search Criteria by using one or more of the following search criteria:

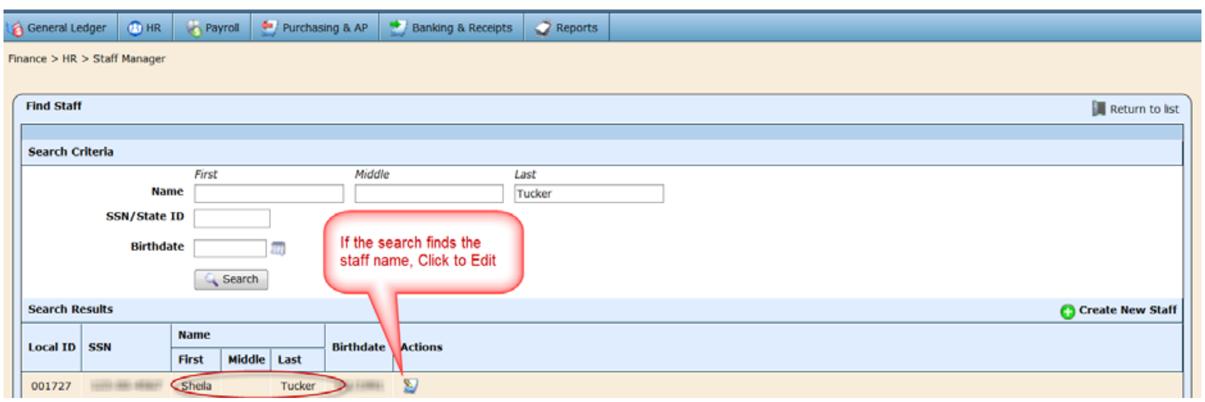
Click **Search**



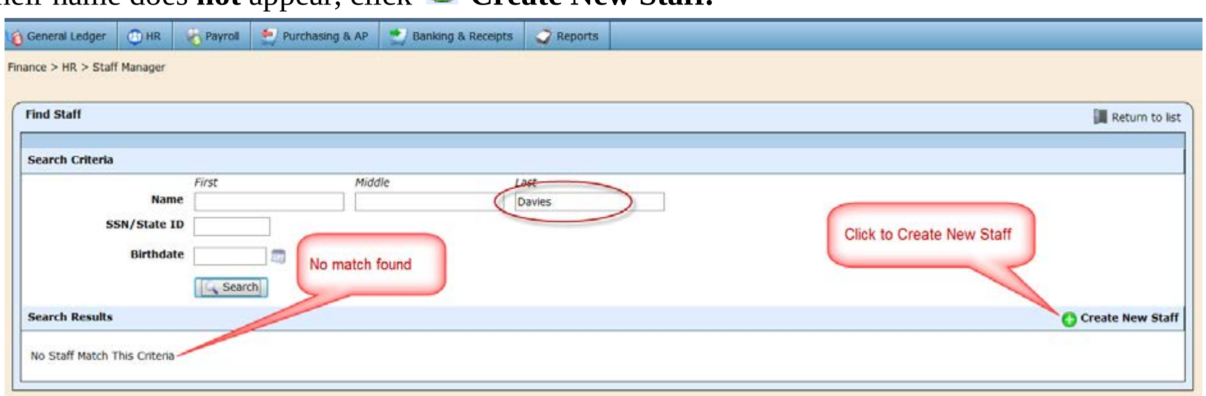
- **Name** - First, Middle, Last
- **SSN/State ID -** Enter the Social Security Number of the Employee
- **Birthdate -** Enter the Birthdate of the Employee

If their name appears, as shown below, they are currently in the system.

Click to edit their information.



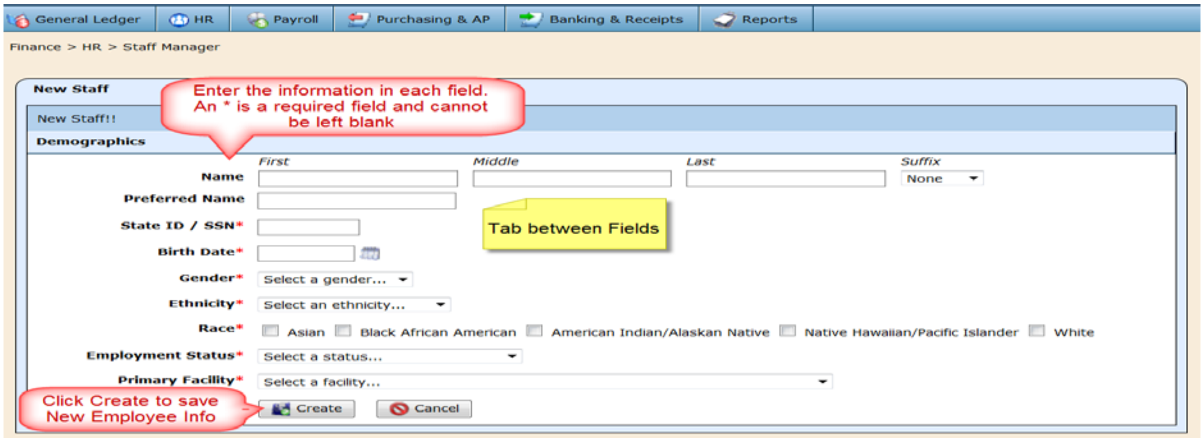
If their name does **not** appear, click **Create New Staff.**



This will bring you to the screen that allows you to begin the new employee setup process.

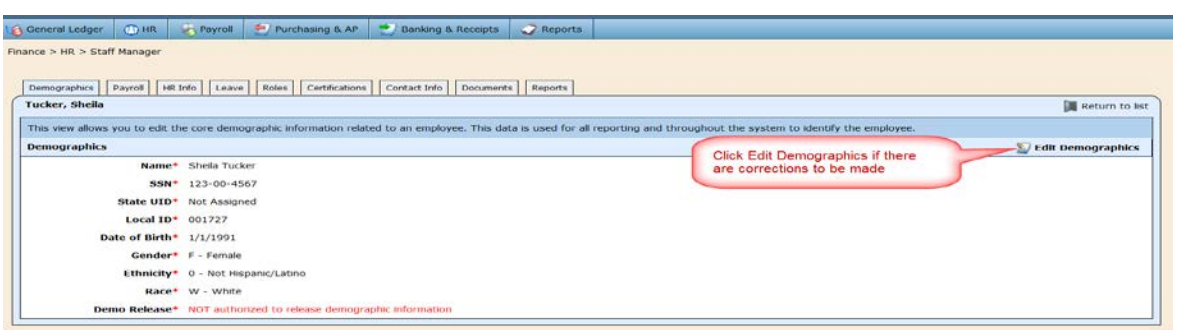
Select **Create** after entering the information in all of the fields.

**This screen contains demographic data used in State PEIMS reporting that will be entered.*

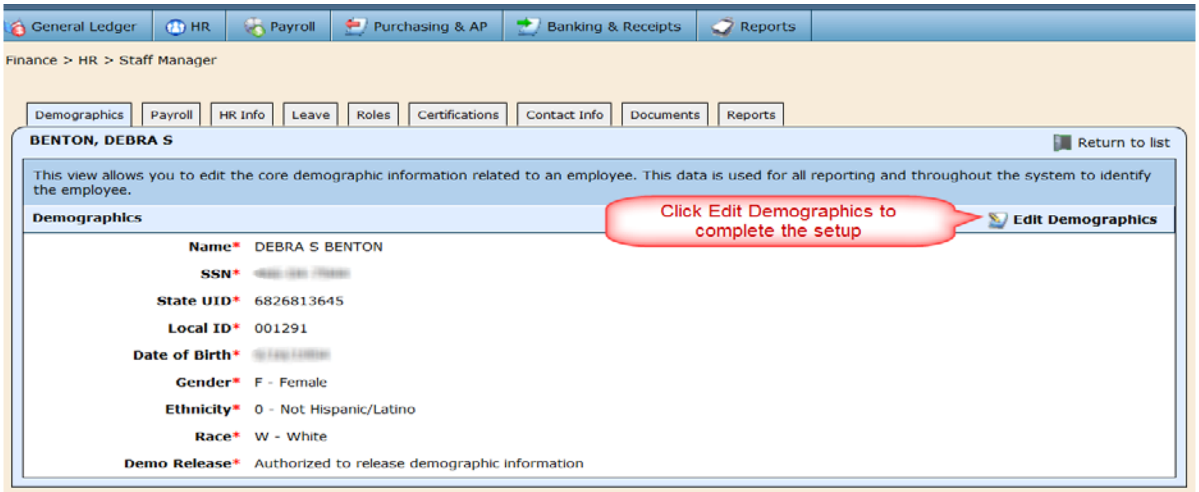


- **Name -** First, Middle, Last. Use drop down arrow for Suffix list. Enter full middle name to avoid PEIMS warnings.
- **Preferred Name -** Enter any preferred name of employee (example: maiden name or nickname).
- **State ID/SSN -** Will already be entered if used in the search criteria.
- **Birthdate –** Enter birthdate in MM/DD/YYYY format.
- **Gender –** Select the gender of the employee from drop down arrow.
- **Ethnicity -** Select the appropriate ethnicity of the employee from drop down arrow.
- **Race** – Select <u>all</u> applicable boxes for **Race.** At least one box <u>must</u> be checked, multiple boxes are permitted.
- **Employment Status –** Select the employment status of the employee from the drop down arrow.
- **Primary Facility –** Select the employee's primary facility from the drop down arrow.

This will bring you to the summary screen. Verify the information you entered is correct on this screen. If it is not, make corrections by selecting "Edit Demographics".

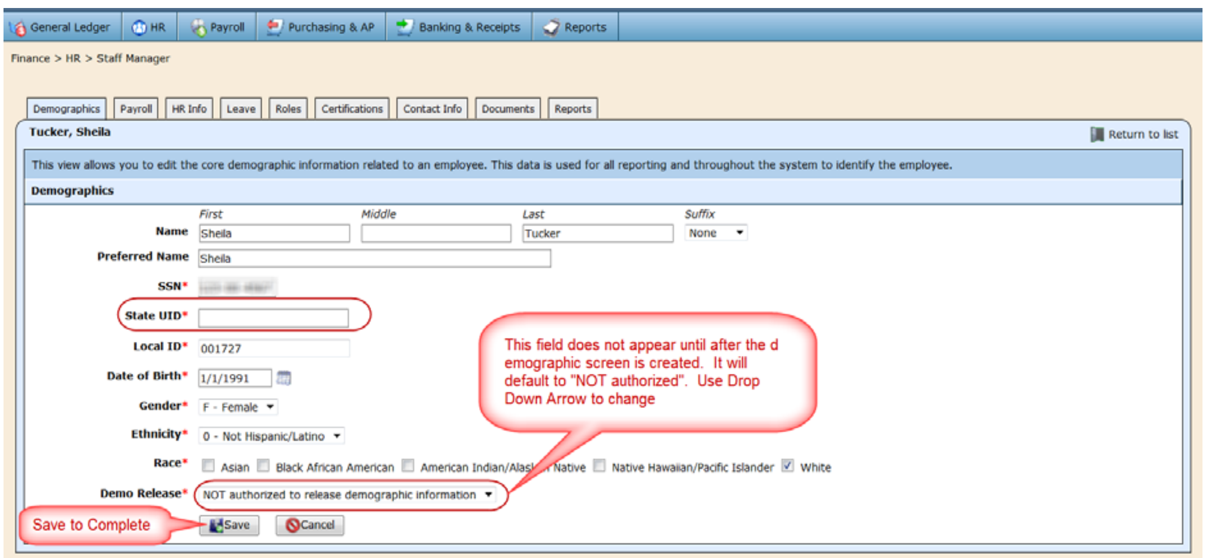


If the employee is found, Click **Edit Demographics** to complete the initial setup.



Edit all the demographic fields that need to be changed or updated.

Select **Save**



- ➢ **Local ID –** This field is the State UID (Unique ID), which is the information obtained from the TSDS.
- ➢ **Demo Release –** Select from the drop down arrow if the employee has authorized or declined the release of their demographic information. This field defaults to “NOT authorized to release demographic information” and you will have to click on Edit Demographics again to change it.

Step 2 – Payroll

Add Contracts

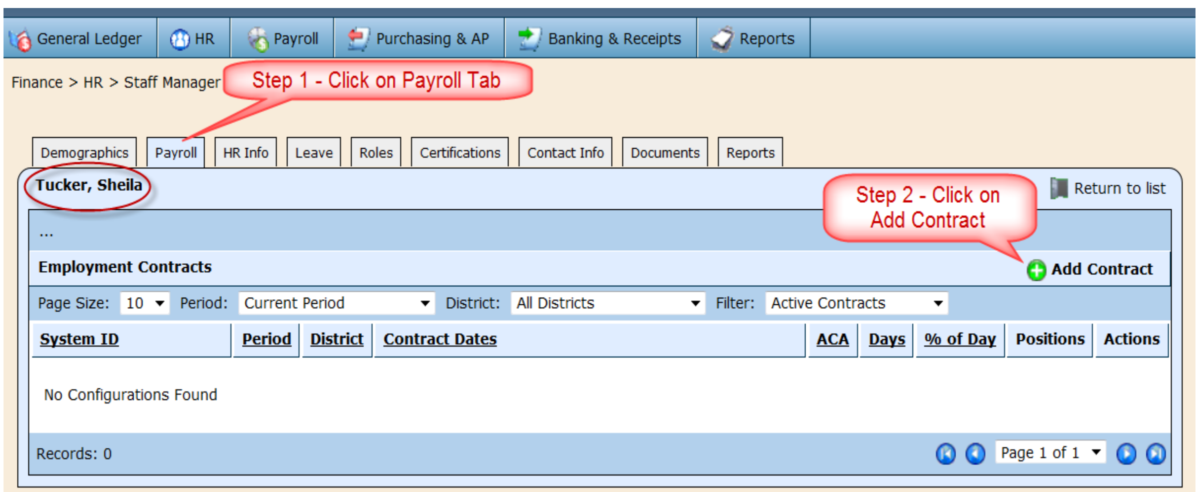
The contract section contains service record and contract information used in payroll processing and printing of service records. All employees must have a contract to be included in the payroll process. The contract replaces the Service Record from the previous WebSmart version.

Finance *> HR > Staff Manager*

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

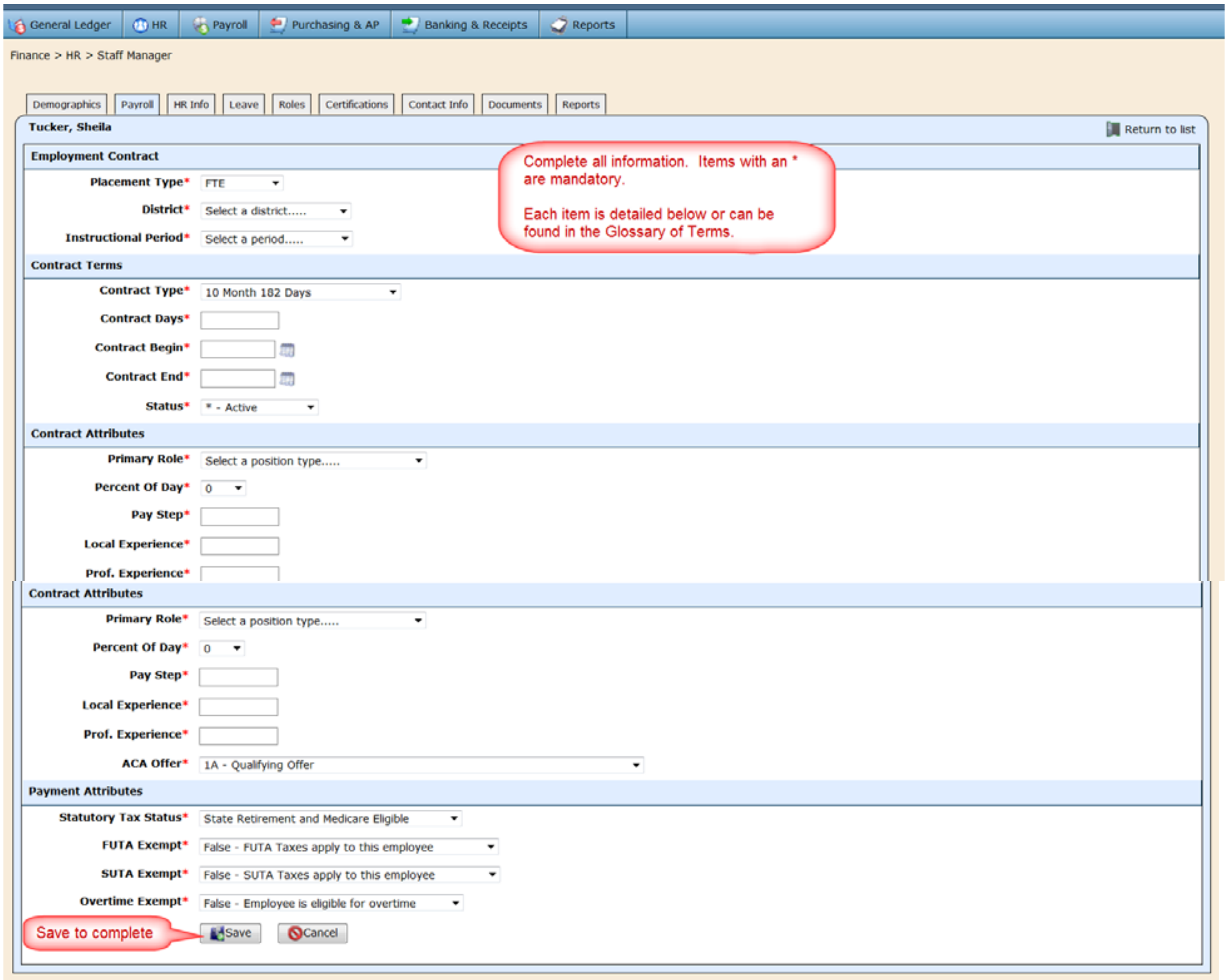
Click on the "**Payroll**" Tab

Click on **Add Contract**



Fill in all of the required information.

Click **Save**



- **Contract Type -** Select the appropriate contract type from the drop down arrow.
- **Placement Type** – Select FTE or Contractor. You will only select contract if you have contracted instructional staff member that needs to be reported to PEIMS.
- **District –** Select the district the employee is associated with from the drop down arrow.
- **Instructional Period –** Select the instructional period from the drop down arrow.
- **Contract Type –** Select the contract type from the drop down arrow. This indicates the annual number of days/months the employee's contract contains. If employee is hired mid-year, you will select the annual contract they would be on if working a full year. The Contract Type is used for TRAQS reporting.
- **Contract Days -** Enter the number of days the employee will work. 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 of the 187 day contract, enter 90 in this field.

  This information is used for TRAQS reporting.

- **Contract Begin –** Enter the contract begin date. This field should indicate the first day the employee reported for work for the instructional period. This information is used for TRAQS reporting.
- **Contract End –** Enter the contract end date. This field should indicate the last date the employee is required to report for work for the instructional period. This information is used for TRAQS reporting.
- **Status –** Select the appropriate employment status from the drop down arrow.
- **Primary Role –** Select the primary position from the drop down arrow. This field is used for TRAQS member data reporting.
  ***If the employee has a position that is exempt from PEIMS, select the position that indicates it is not a reportable position.*

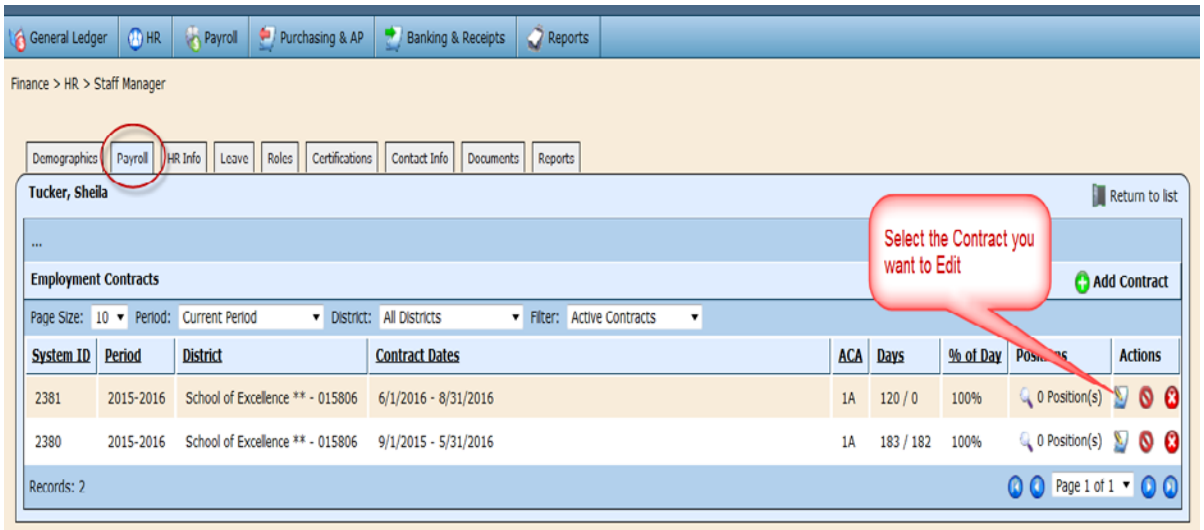
- **Percent of Day –** Enter the percent of day from the drop down arrow. This indicates the percent of the day that the employee is working for the district.
- **Pay Step –** Enter the pay step of the employee (if applicable).
- **Local Experience –** Enter the number of years of experience the employee has had *at the district.* If it their first year, enter 0.
- **Professional Experience –** Enter the number of years experience the employee has had in all school districts (information from prior service records). If it is their first year, enter 0.
- **ACA** is the Affordable Care Act. You MUST select an option from the Droop Down Arrow.
- **Statutory Tax Status –** Select the appropriate statutory taxes for the employee from the drop down arrow
  - Ineligible for all statutory adjustments – H1B Visa employees.
  - Medicare eligible only – retired employees.
  - FICA and Medicare eligible – substitutes/schedule less than 20 hours a week.
  - 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 school districts that participate in FICA and TRS options for full-time staff.
- **FUTA Exempt –** If your district is required to participate in Federal unemployment:
  - True – FUTA Taxes DO NOT apply to this employee.
  - False – FUTA Taxes apply to this employee.
- **SUTA Exempt**
  - True – SUTA Taxes DO NOT apply to this employee – some superintendents may be considered SUTA Exempt.
  - False – SUTA Taxes apply to this employee – Applies to most employees.
- **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.

Edit Contracts

***Finance** > HR > Staff Manager*

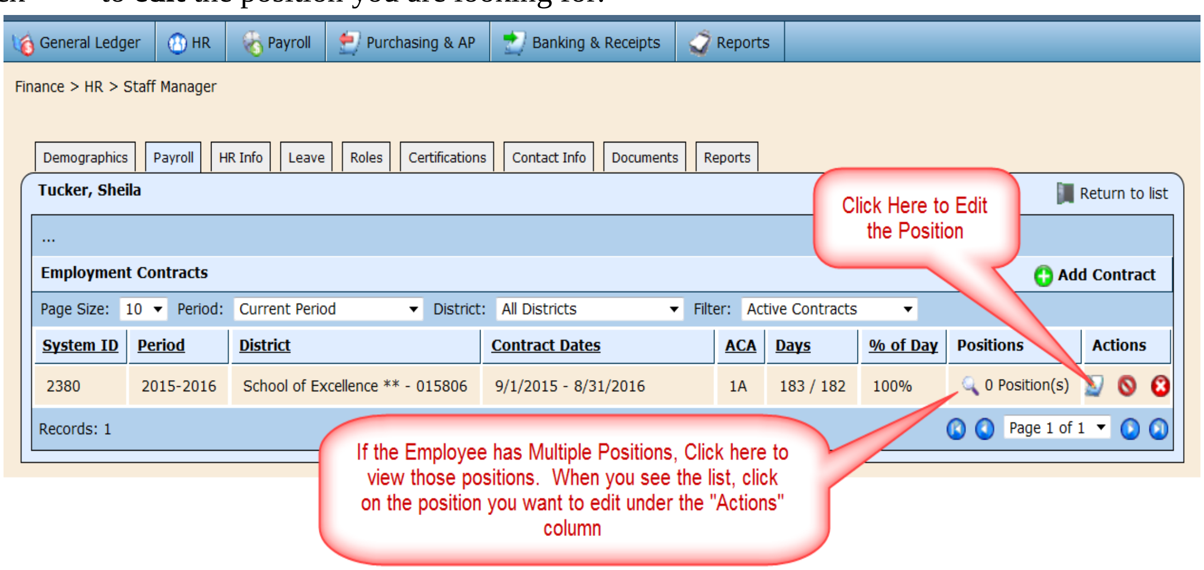
Click to **edit** the contract.



If the employee has *multiple* positions:

Click to **view** those positions.

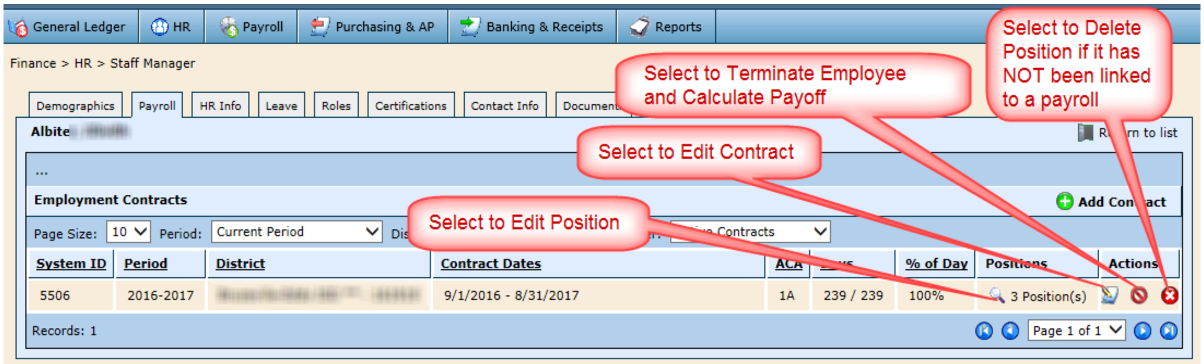
Click to **edit** the position you are looking for.



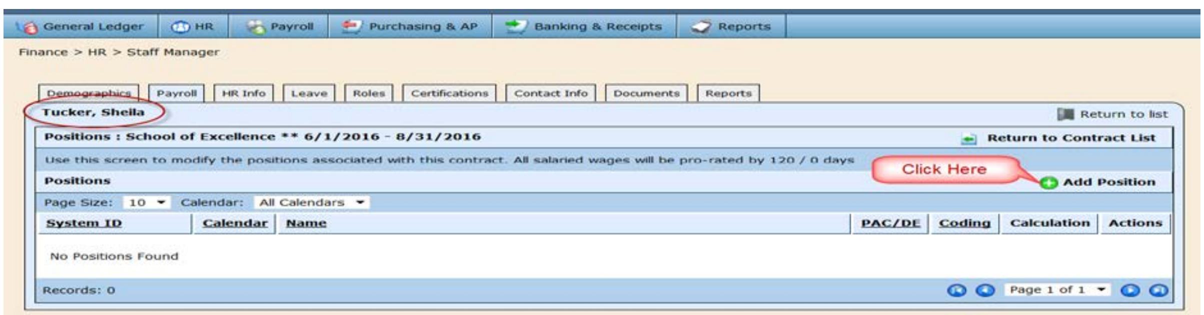
Add/Edit Positions

Finance *> HR > Staff Manager >*

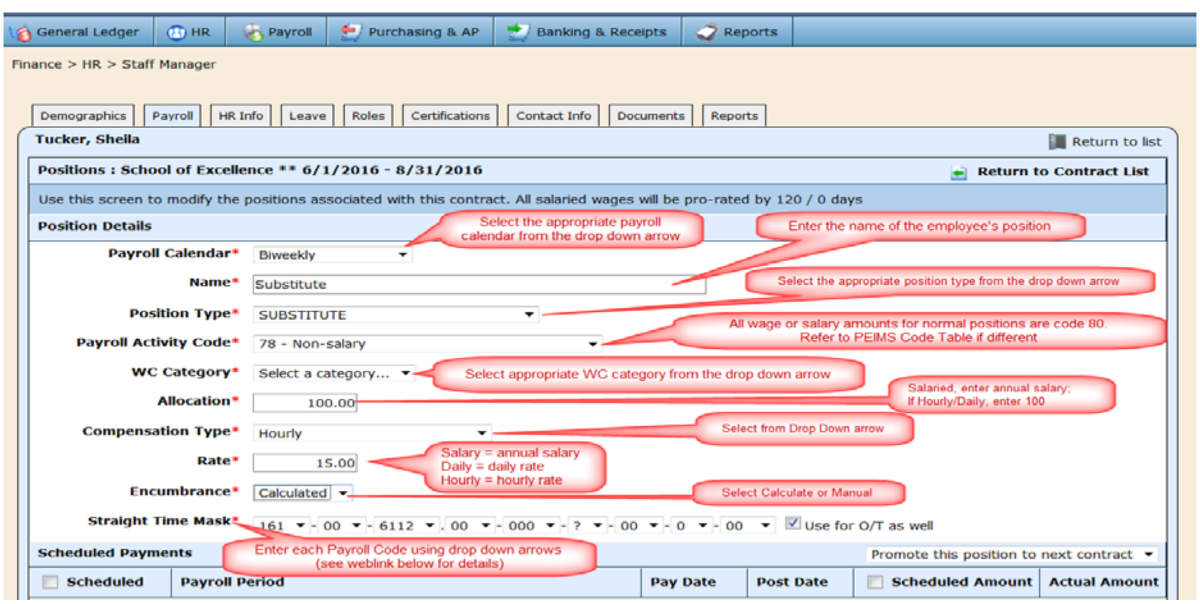
Click **Position(s)**



Click **Add Position**



It will take you to the screen shown below to modify and/or enter the position information associated with the contract.

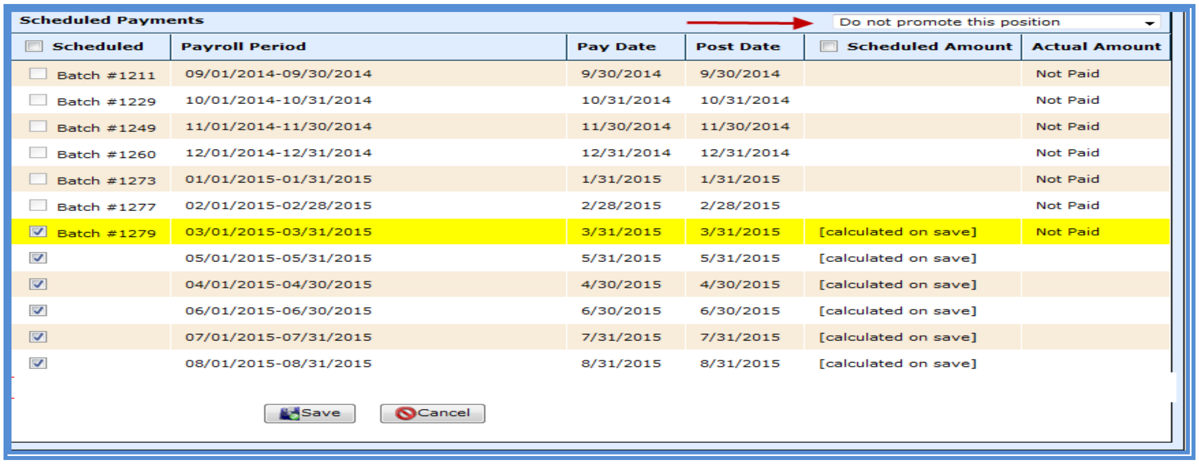


- **Payroll Calendar –** Select the appropriate payroll calendar from the drop down arrow.
- **Name –** Enter the name of the position of the employee (this is a free-form field for reporting purposes).
- **Position Type –** Select the appropriate position type from the drop down arrow.
- **Payroll Activity Code –** All wage or salary amounts for primary 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 arrow.
- **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.
  - Substitute/Extra Duty positions – Leave 0.
- **Compensation Type –** Select the appropriate compensation type for the employee.
- **Rate –** Enter the rate of pay of the employee.
  - Salary – Enter the employee's annual salary.
  - Daily – Enter the employee's daily rate.
  - Hourly – Enter the employee's hourly rate.
- **Non – Prorated Value –** Select this option if you need to add a stipend to 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. Usually for Extra Duty or Stipend.
  - True – Wages earned from the position are NOT used to calculate dock rate.
  - False – Wages earned from the position are 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 .

In Position screen shown above, the bottom portion is the Scheduled Payments section. This is the section where you may promote a position. The "Do not promote this position" is defaulted and you will need to use the drop down arrow to change the selection to "Promote the Position."

- **Promote Position –** Use drop down arrow to select the promotion action desired for the position for the next instructional period. You may elect not to promote a stipend, extra duty or extracurricular position.

✓ Check the box for each pay period 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.

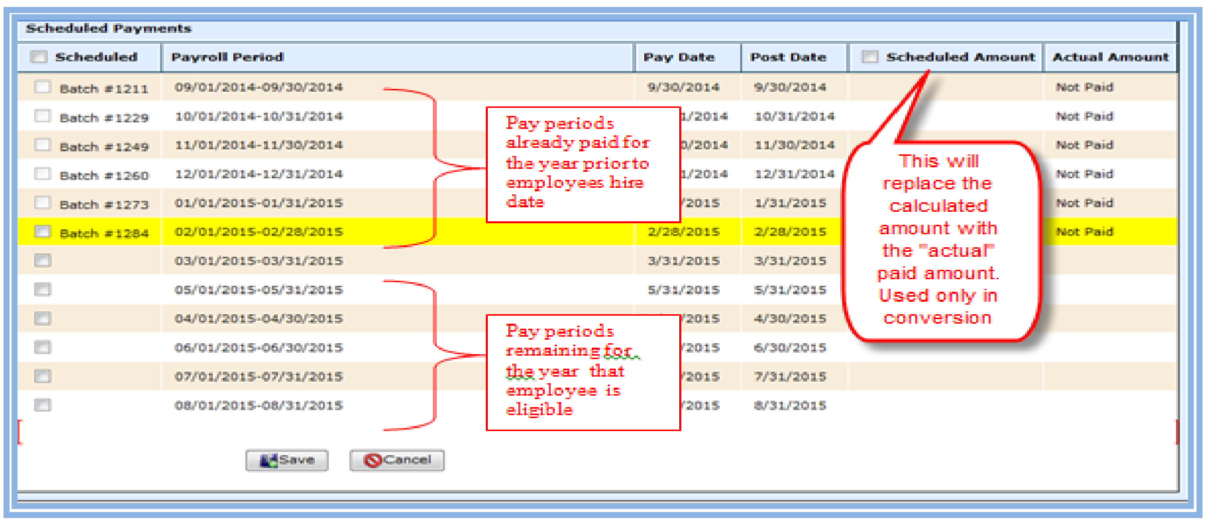


Scheduled Payments — Do not promote this position

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

Save Cancel

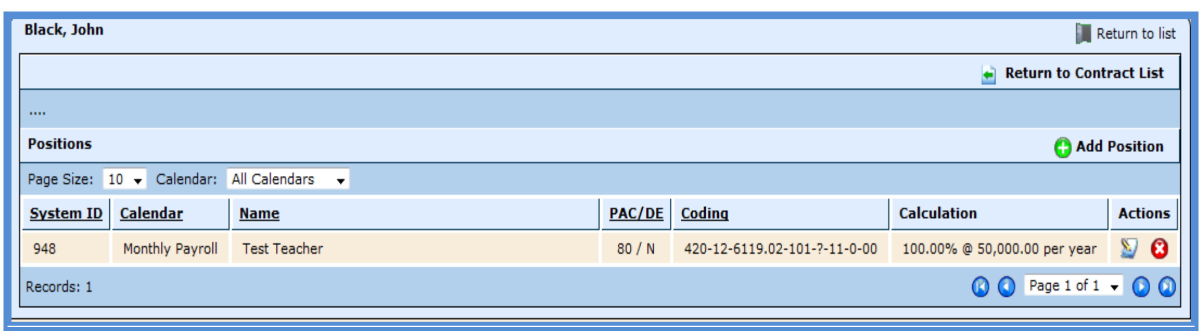
The available payments will calculate once the payment schedule has been saved. To see the payment schedule, you will have to exit this screen and click back on it to review.



Scheduled Payments

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

Click **Save**



Black, John — Return to list

Return to Contract List

Positions — Add Position

Page Size: 10 Calendar: All Calendars

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	

Records: 1 — Page 1 of 1

If an employee has more than one position click **Add Position** and complete each position.

Step 3 – HR Info

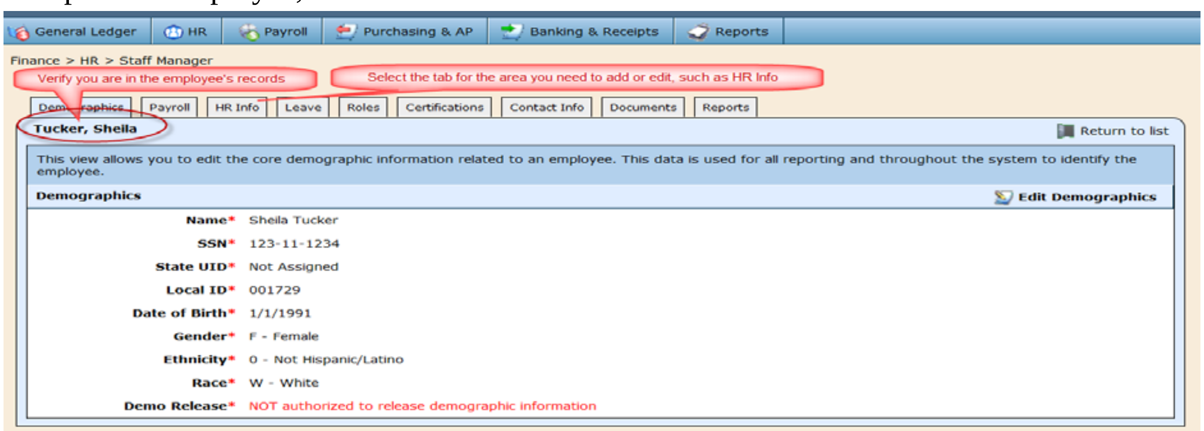
The HR section contains all of the information that determines the employee's deductions from their base pay and contains multiple elections, all of which must be entered separately.

General HR Attributes

Finance *> HR > Staff Manager*

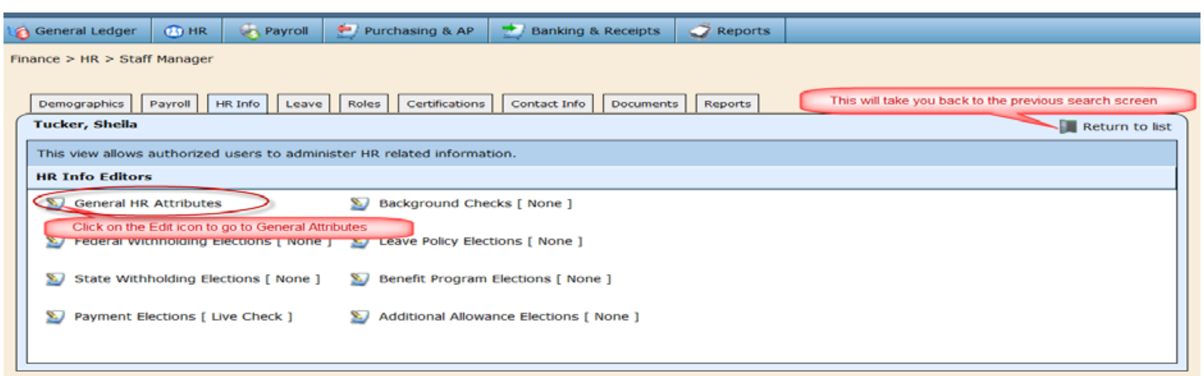
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

To Set up a new employee, start with the HR Info Tab.

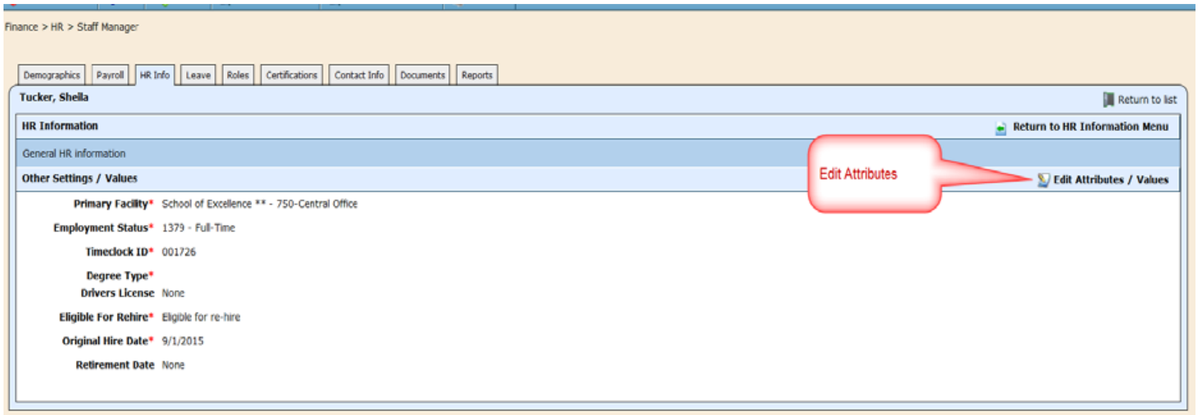


Edit General Attributes

Click **General HR Attributes** under the HR Info Tab



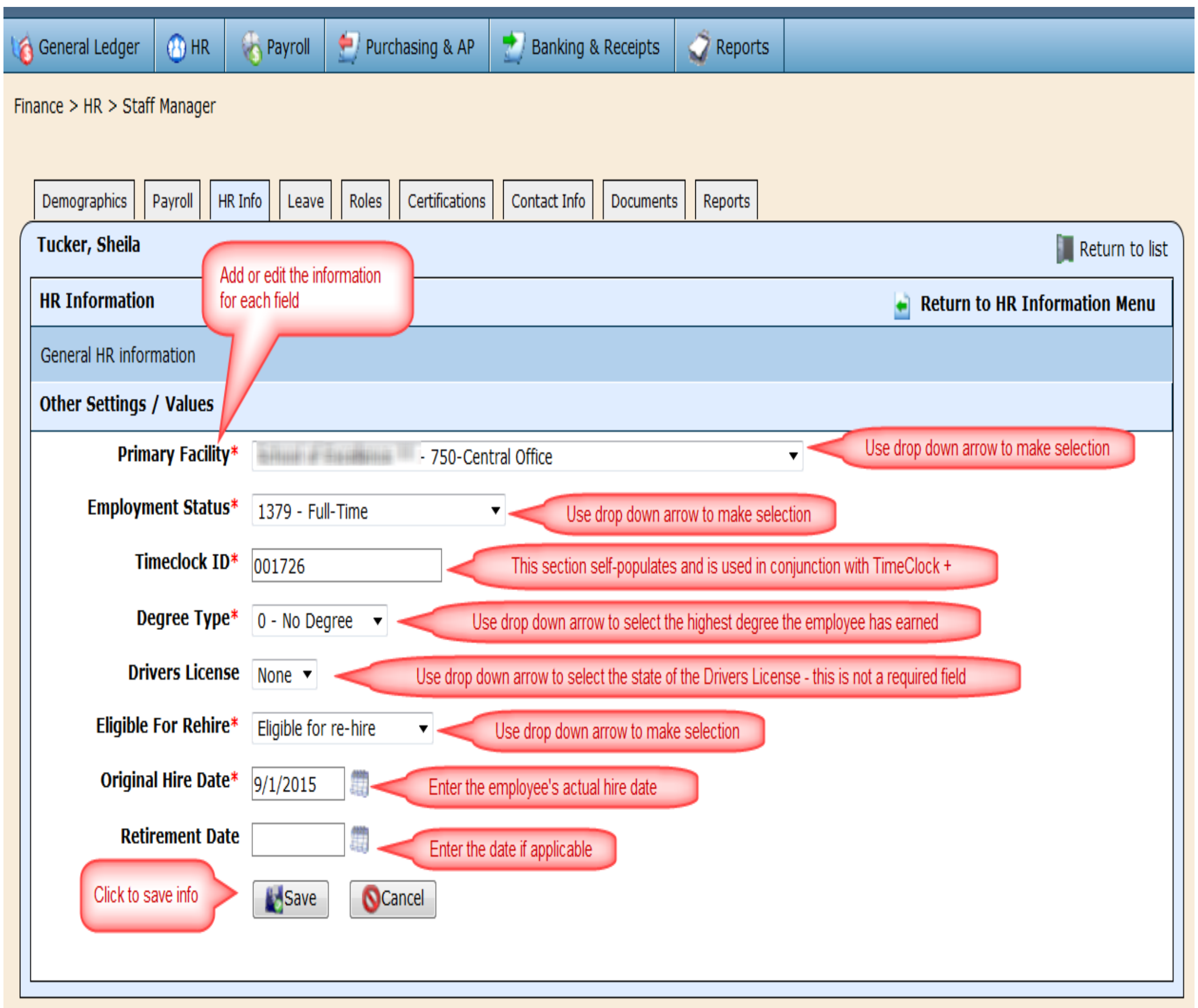
Click **Edit Attributes/Values** under the HR Tab



This will bring you to the Attributes/Values screen.

Enter the information as shown below.

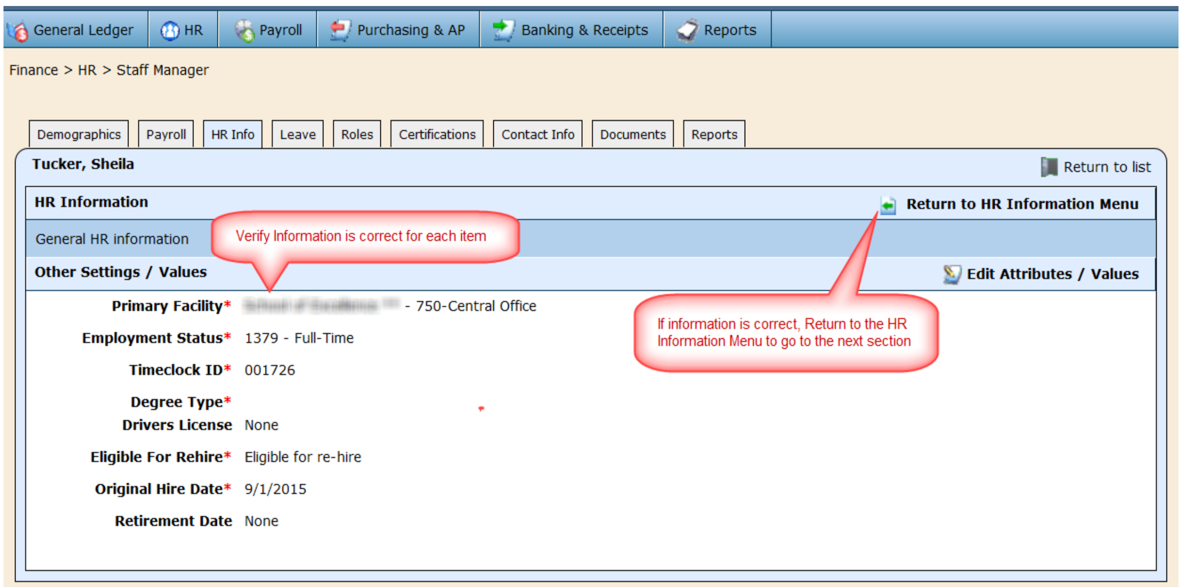
Click **Save**



Attributes/Values Screen Descriptions

- ➢ **Primary Facility** and **Employment Status** are pre-populated; however, they can be edited.
- ➢ **Timeclock ID –** This will be compatible with the TimeClock Plus Software.
- ➢ **Degree Type –** Select the highest degree the employee has received from the drop down arrow.
- ➢ **Drivers License –** Enter the Driver's License number of the employee (optional).
- ➢ **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 MM/DD/YYYY.
- ➢ **Retirement Date –** Enter the retirement date of the employee if applicable MM/DD/YYYY.

This will bring you to a summary screen. Please verify the information you have entered is correct before proceeding to the next section.

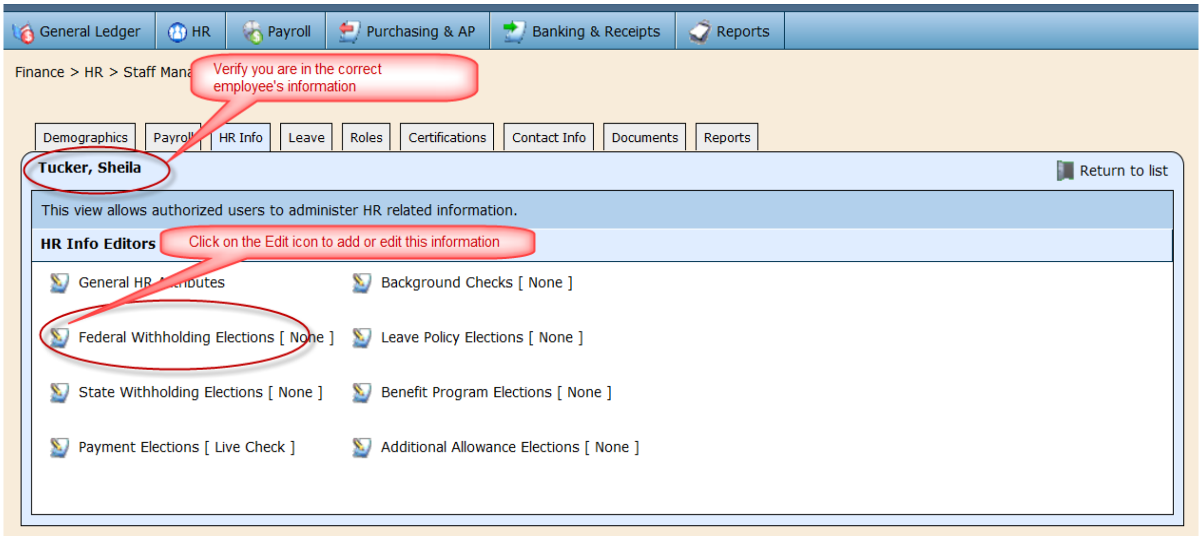


Click **Return to HR Information Menu**

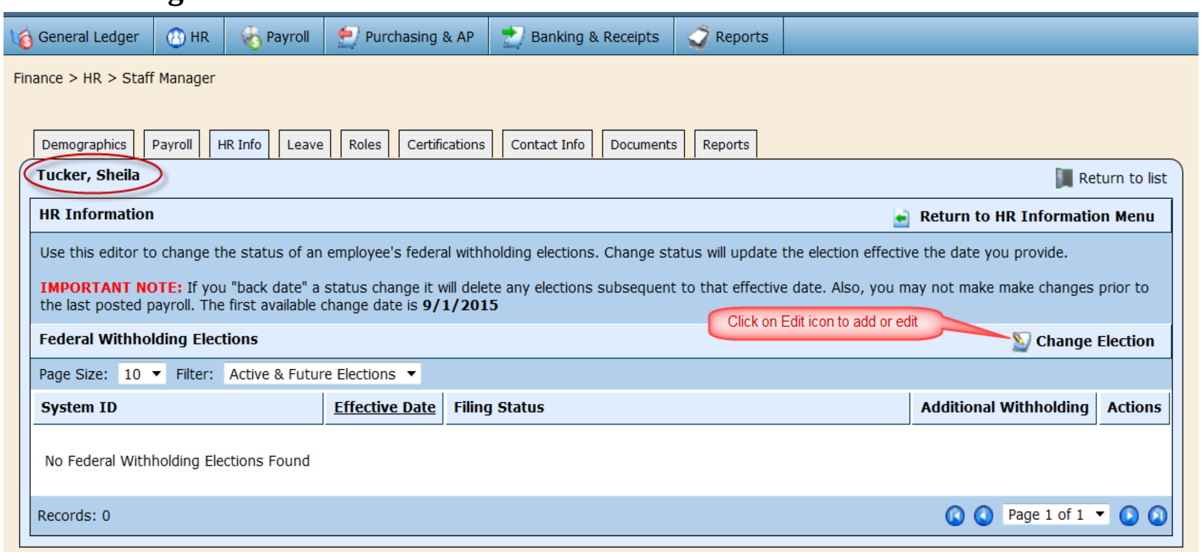
Federal Withholding Elections

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click **Federal Withholding Elections** under the HR Info Tab

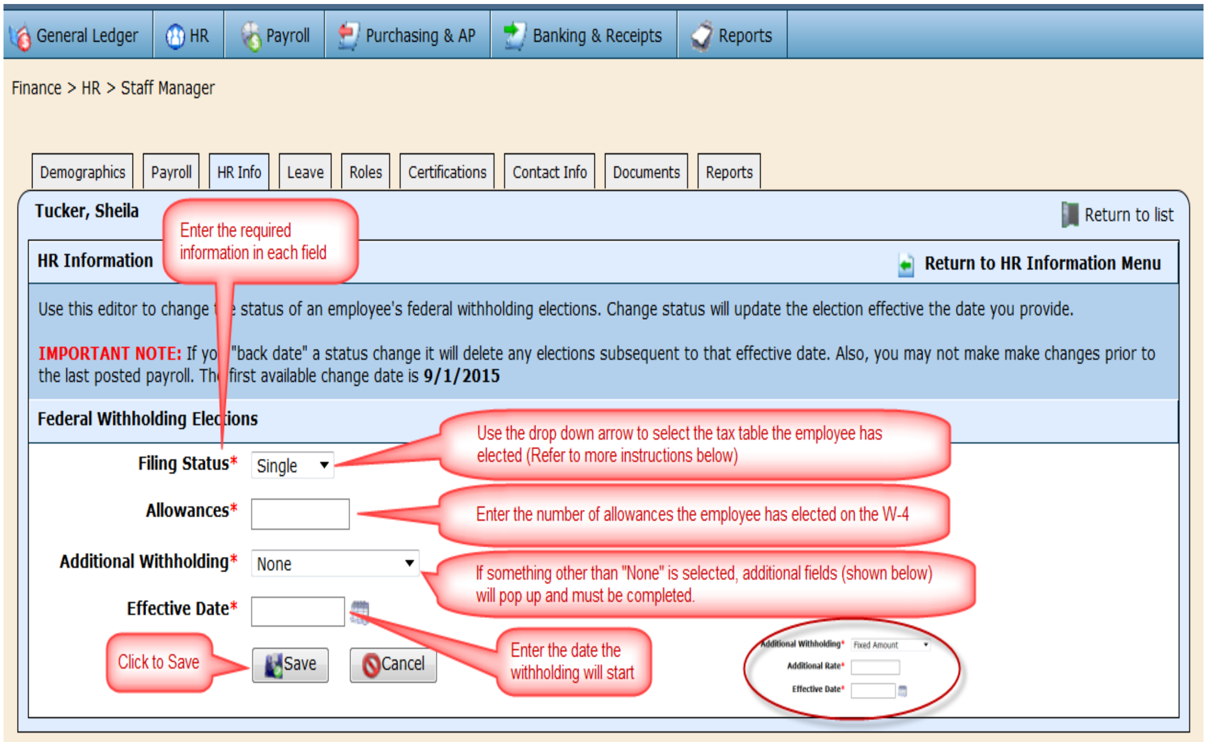


Click **Change Election**

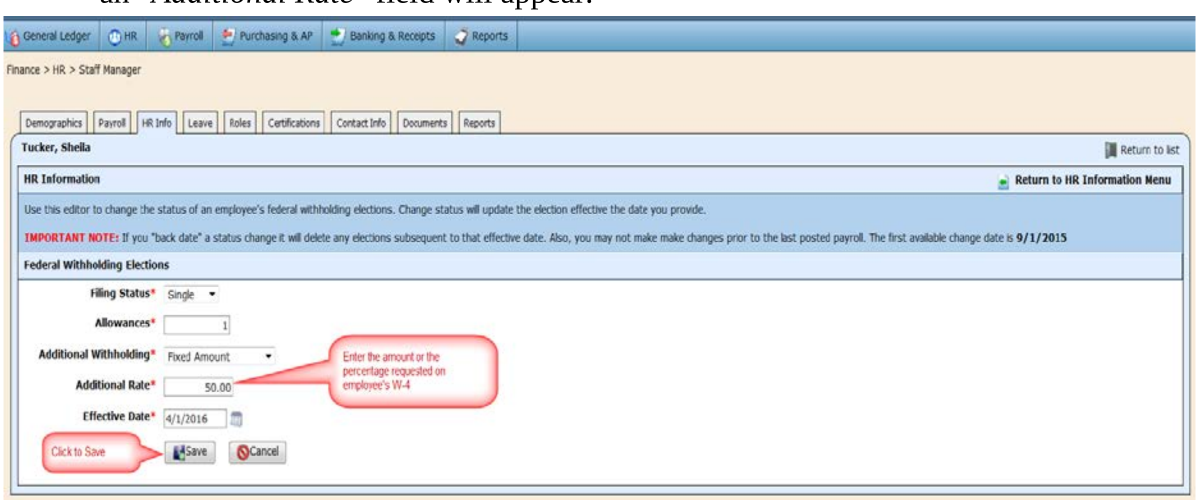


Enter the required information (see descriptions below):

Click **Save**

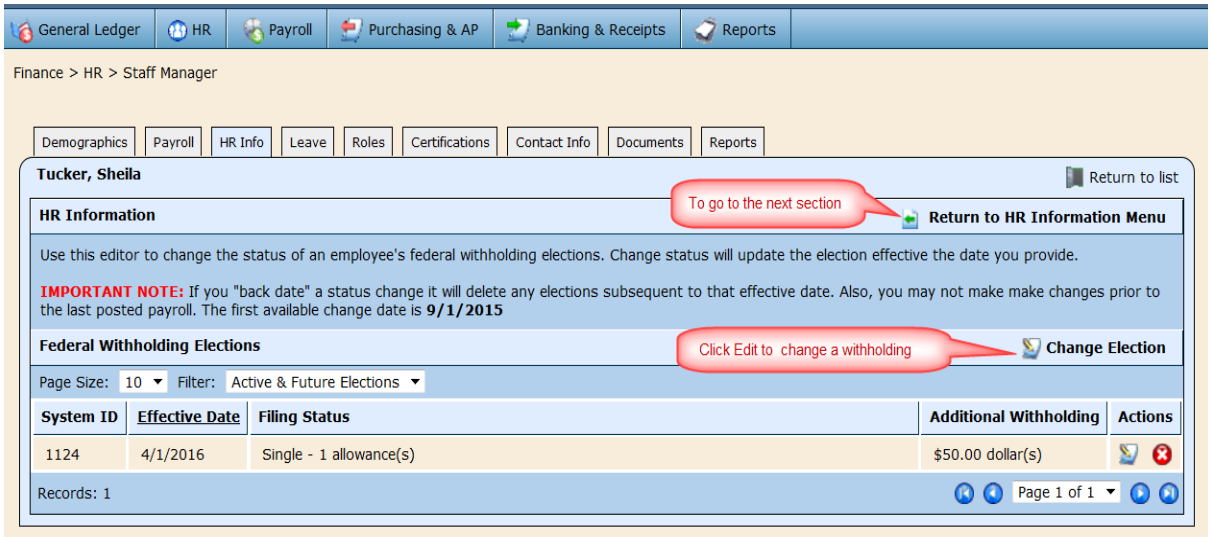


- **Filing Status –** Use drop down arrow to select which tax table (Single or Married) the employee has elected. (http://www.irs.gov/publications/p15).
- **Allowances –** Enter the number allowance the employee has elected on W-4.
- **Additional Withholding –** Use the drop down arrow to select if employee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



- **Additional Rate –** Enter the amount or the percentage requested on employee's W-4.
- **Effective Date –** Enter the effective date of the withholding election.

The screen shown below will give you a summary of what you have entered.

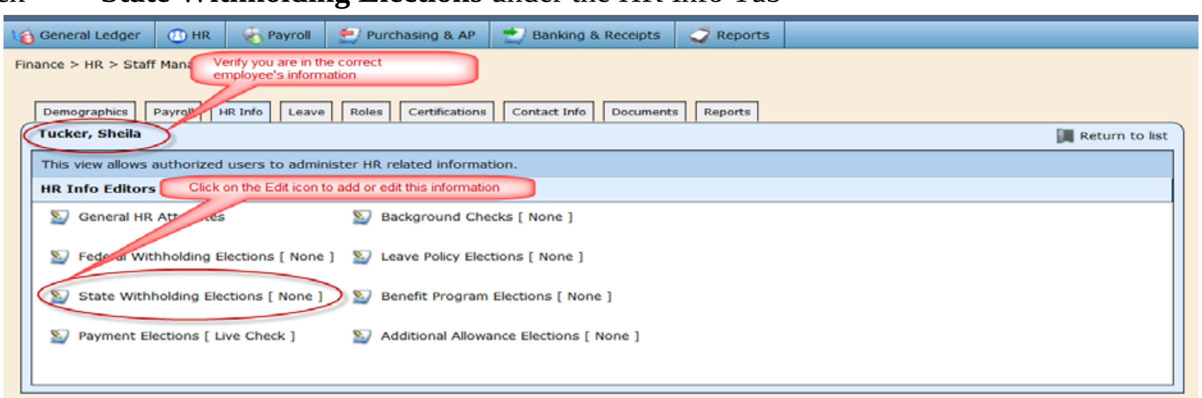


Click **Return to HR Information Menu**

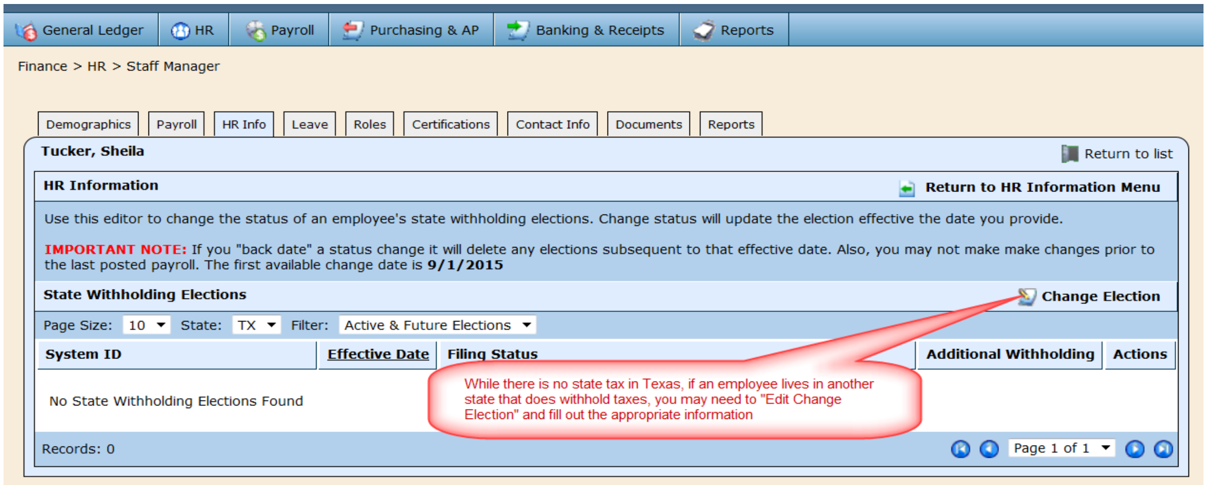
State Withholding Elections

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click **State Withholding Elections** under the HR Info Tab



***Note: There is currently no state tax in Texas*



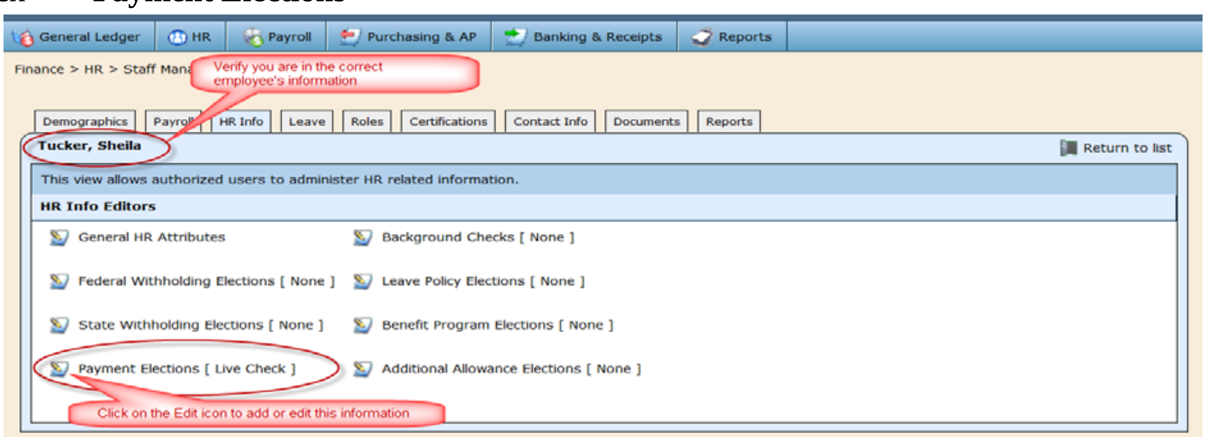
Click **Return to HR Information Menu**

Payment Elections

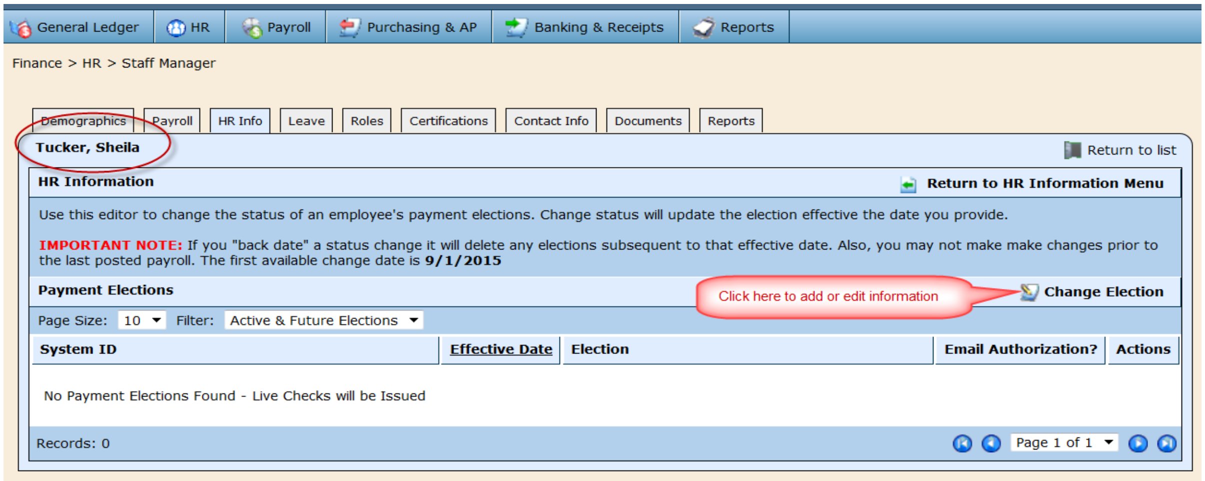
The Payment Elections section determines if an employees' check is direct deposited or if a live check is issued.

****Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."***

Click **Payment Elections**



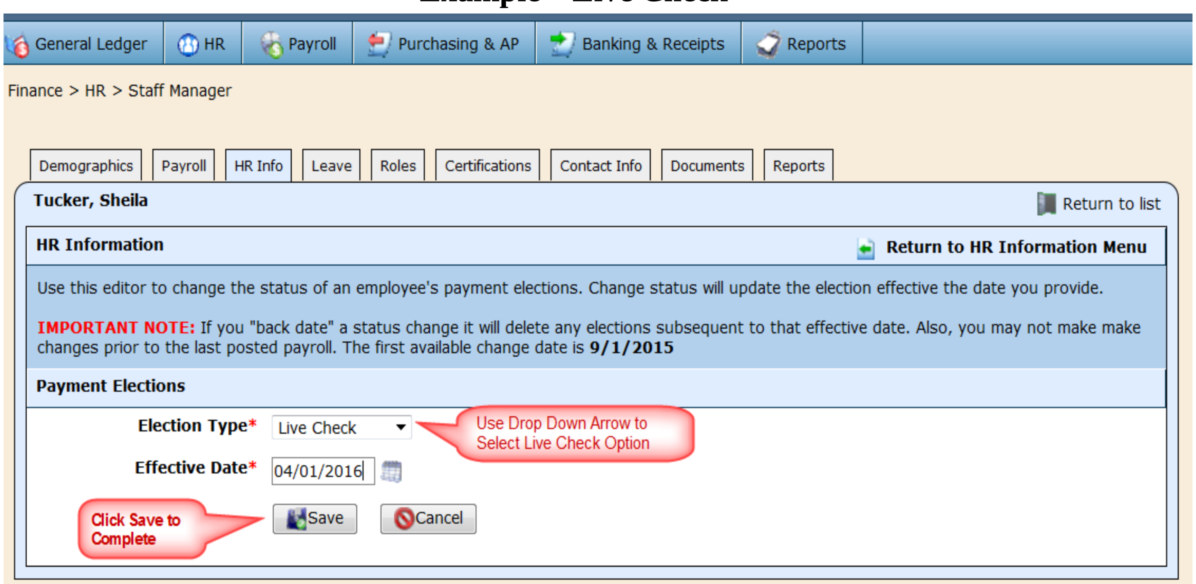
Click **Change Election**



Refer to the screen below if an employee wants to:

a) change the way they receive their checks,
b) how they receive notifications,
c) or for electronic deposits to go to multiple bank accounts.

Example – Live Check



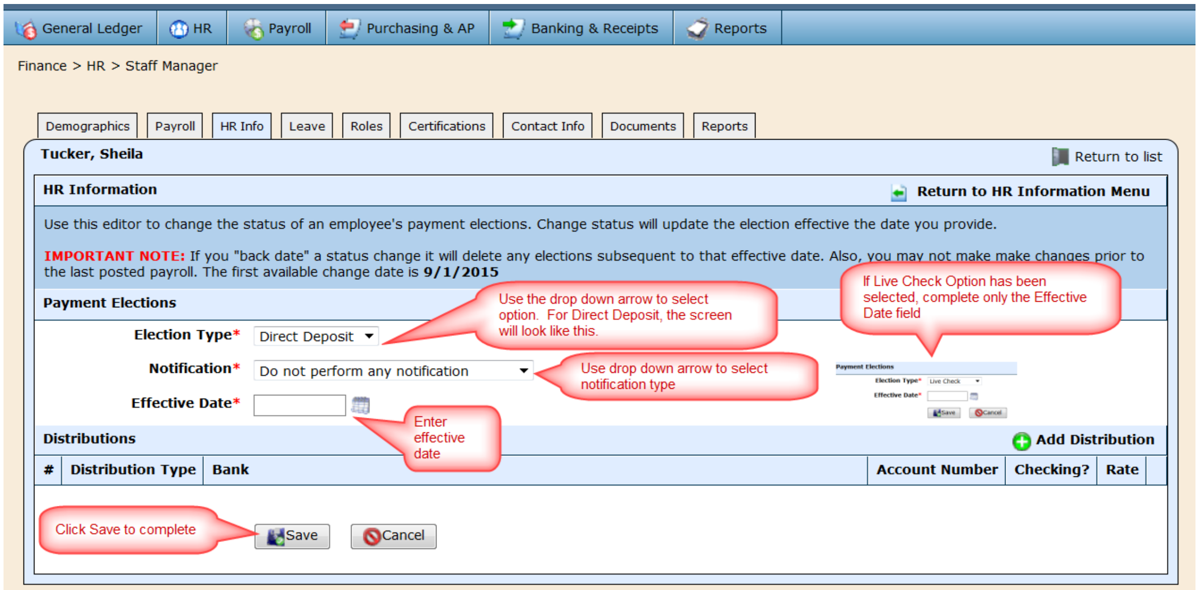
➢ **Election Type –** Select the election type from the drop down arrow.

***If direct deposit is selected, additional fields will appear on the screen as shown below)*

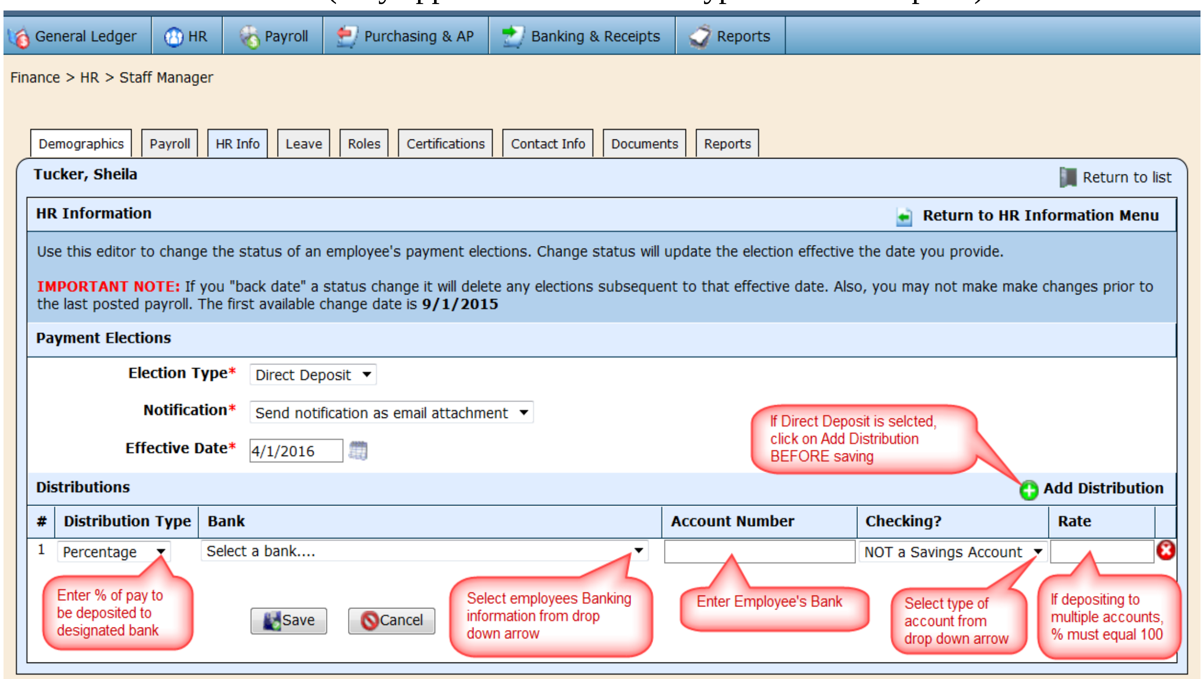
➢ **Notification –** Select if a notification (check stub) is sent via email to the employee.

➢ **Effective Date –** Enter the effective date of the payment election.

Example - Direct Deposit

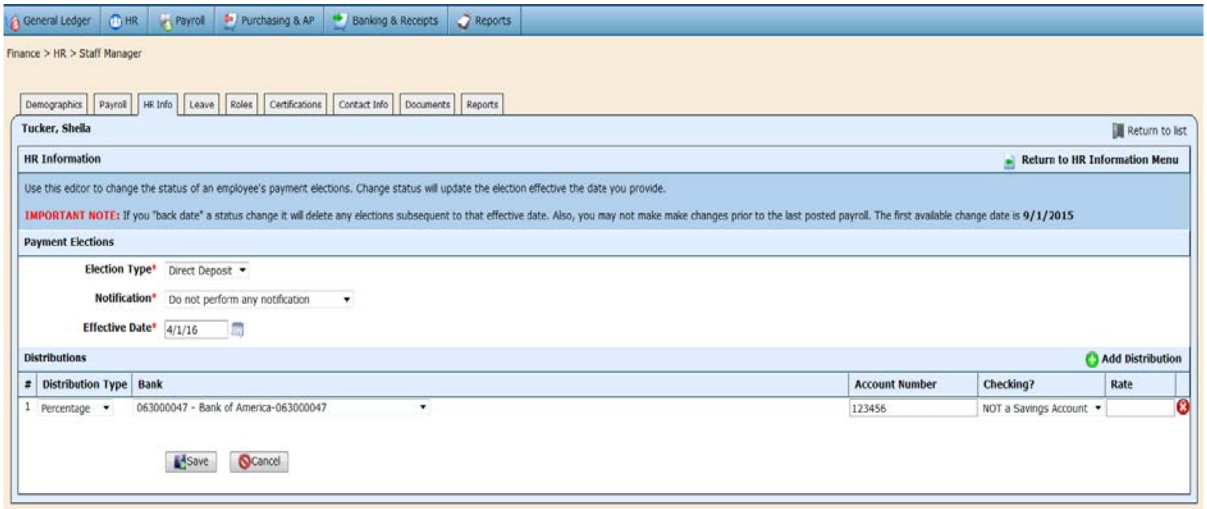


Click **Add Distribution** (only applicable if Election Type is Direct Deposit)



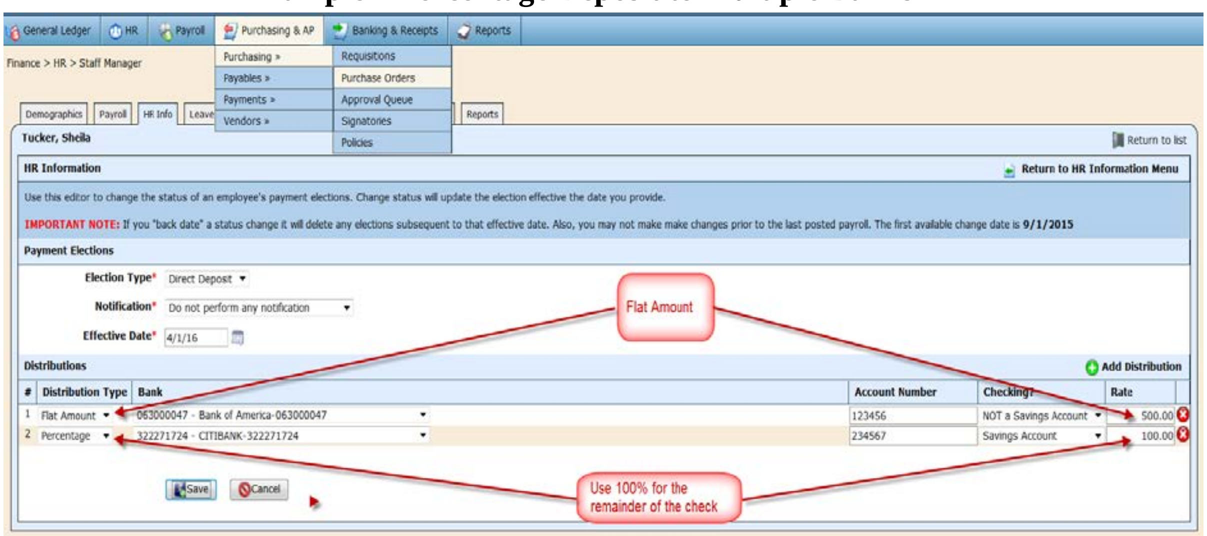
- **Distribution Type** - Select the distribution type from the drop down arrow.
- **Bank** - Select the employee's bank from the drop down arrow.
- **Account Number** - Enter the employee's account number for the direct deposit.
- **Checking** - Select if the account is/is not a savings account.
- **<u>Rate</u>** - 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.

Example – Deposit to One Bank



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

Example – Percentage Deposit to Multiple Banks



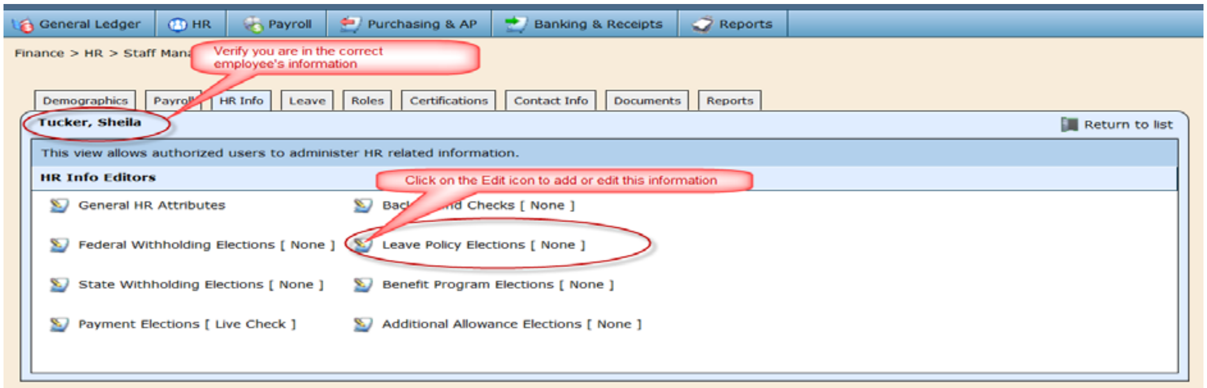
Click **Return to HR Information Menu**

Leave Policy Elections

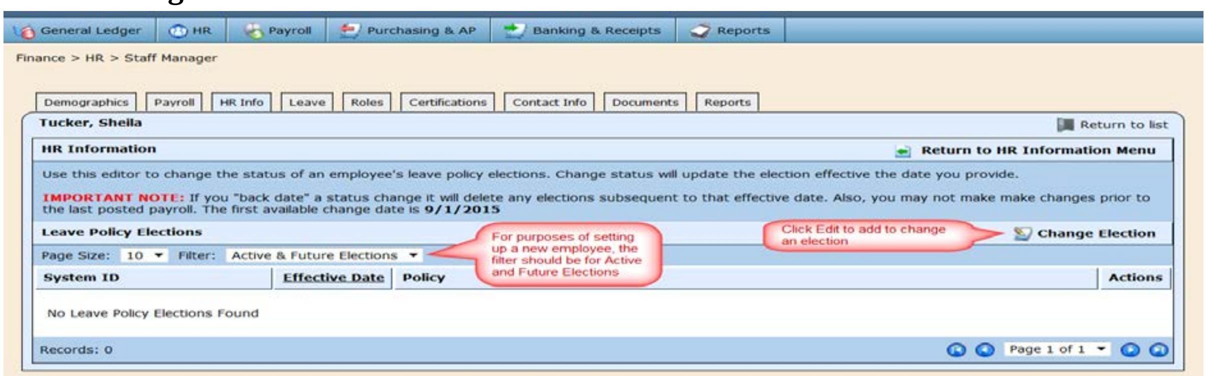
The Leave Policy Elections is the section under the HR Info Tab where you set up the types of leave an employee will be using.

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click **Leave Policy Elections** under the HR Info Tab

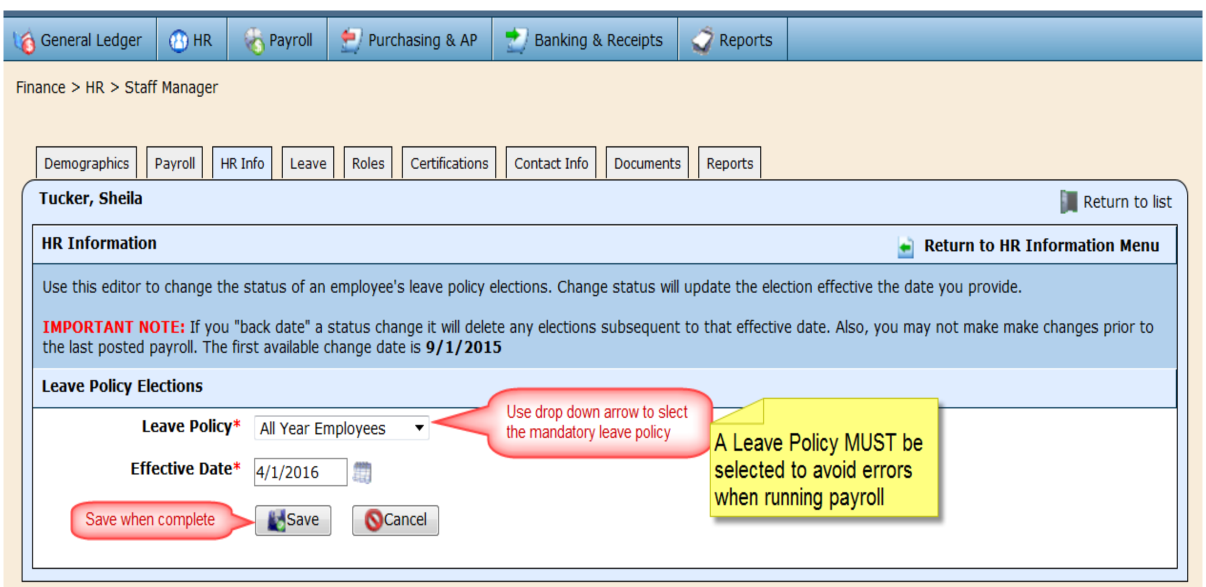


Click **Change Election**



Enter the information for the Leave Policy.

Click **Save**



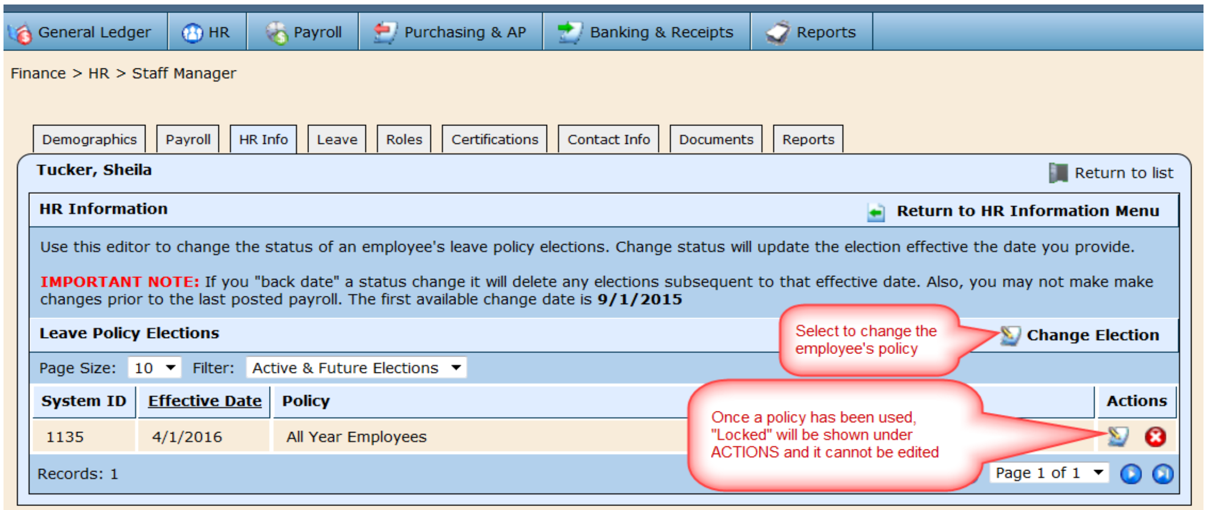
- ➢ **Leave Policy –** Select the appropriate leave policy from the drop down box.

***Even if the employee is not eligible to receive Leave Days, you <u>must</u> select a Leave Policy (such as 182 & 187 Day Leave, All Year Employees or Not Eligible for Leave).

***If a Leave Policy is NOT selected, an error will occur in the Payroll Batch*.**

- ➢ **Effective Date –** Enter the effective date of the leave policy

You will see a summary screen. Verify the information is correct. If not, Edit the policy.

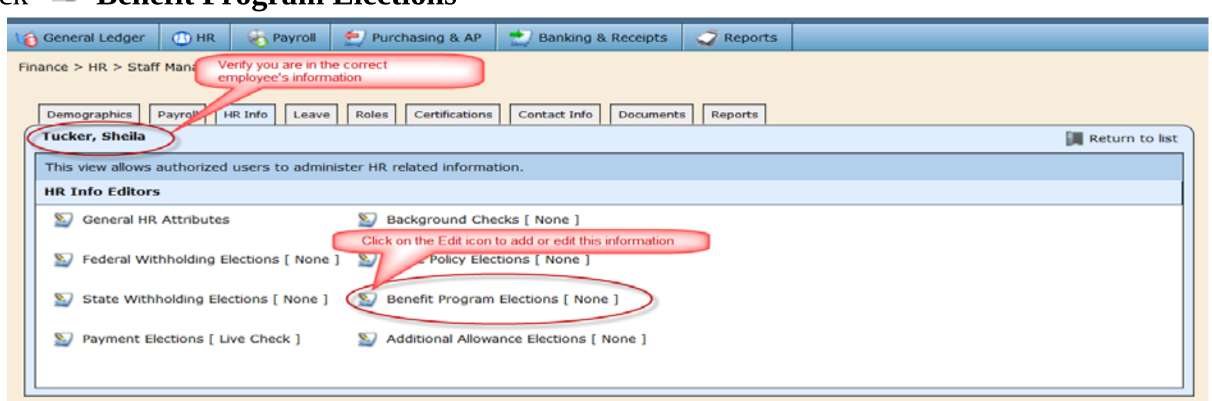


Click **Return to HR Information Menu**

Benefit Program Elections

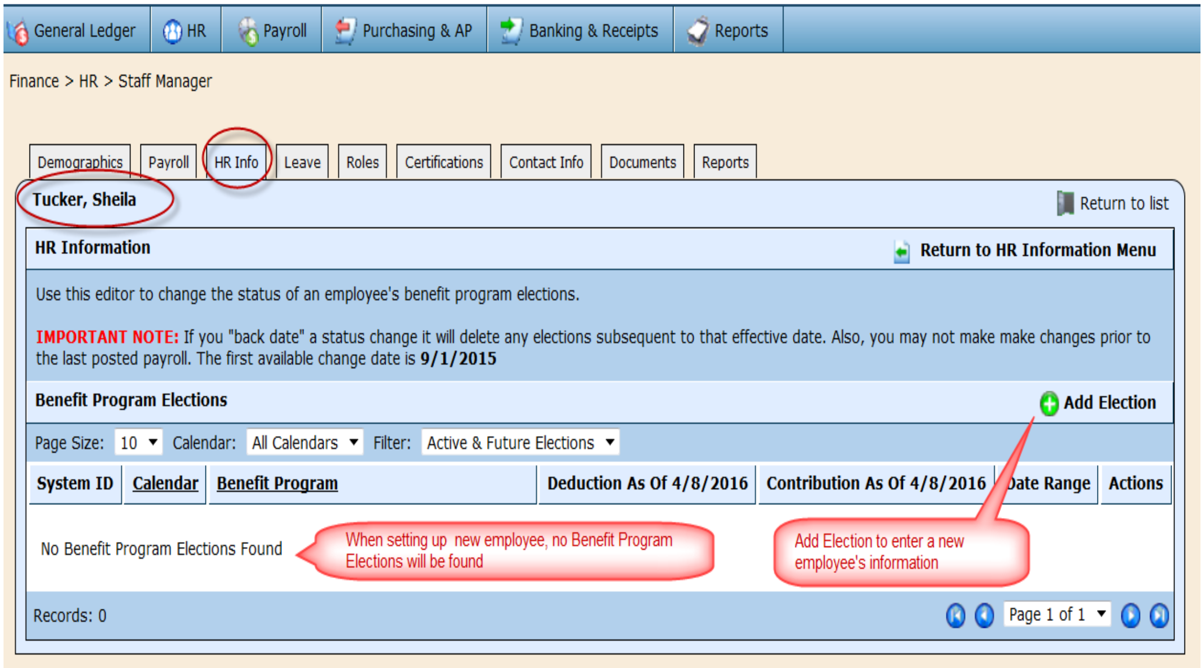
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click **Benefit Program Elections**

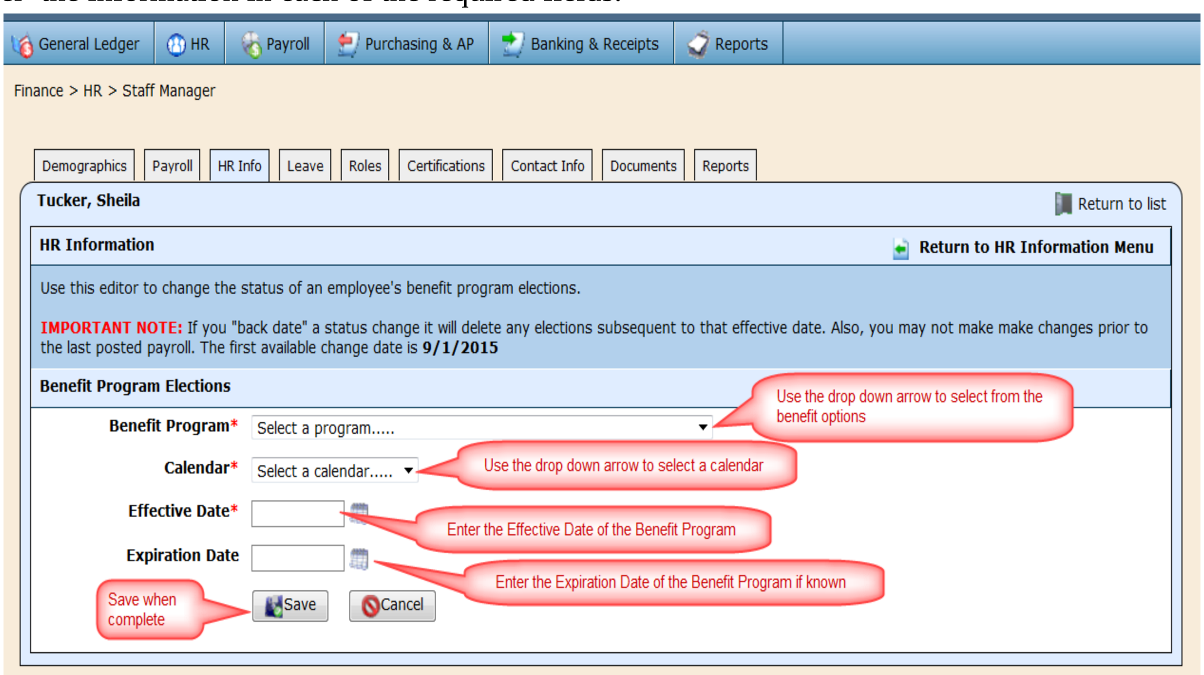


Add an Election

Click **Add Election**

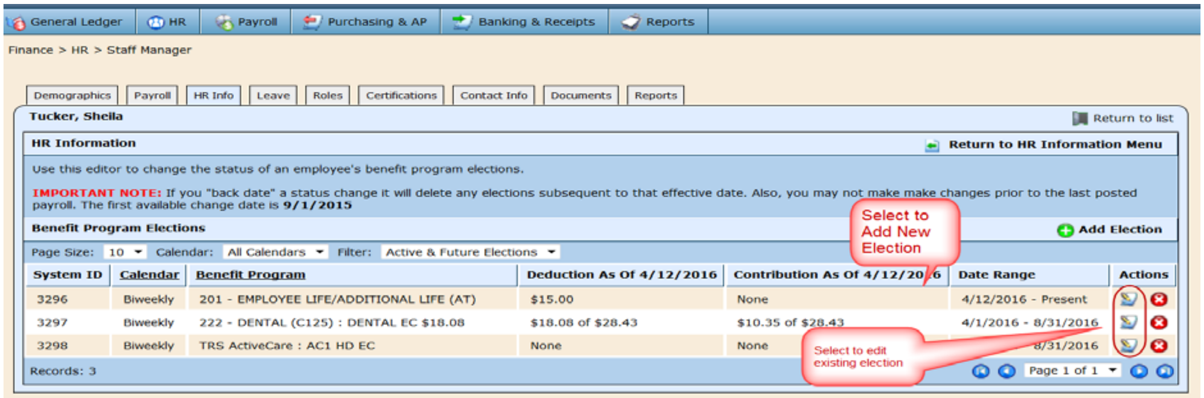


Enter the information in each of the required fields.

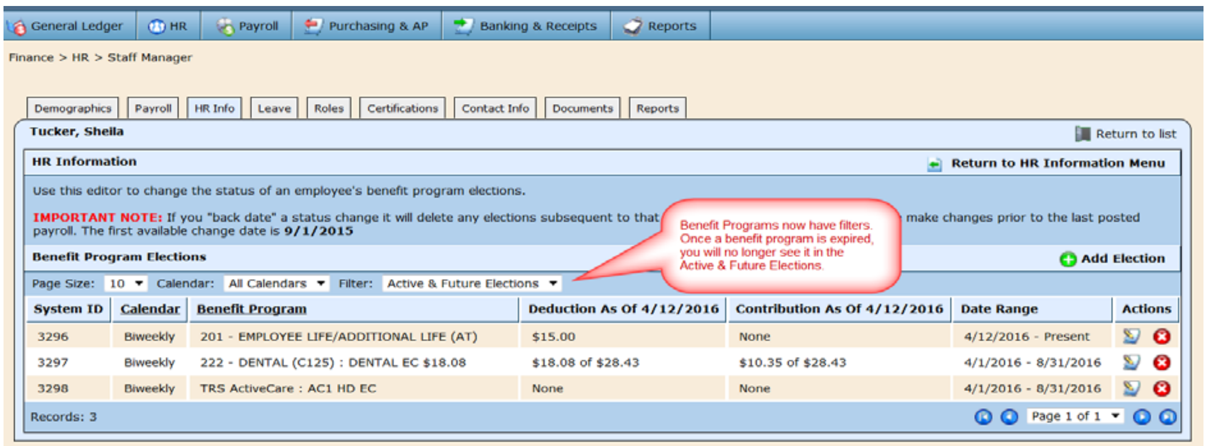


Edit Existing Election

Click to edit **an existing election**.

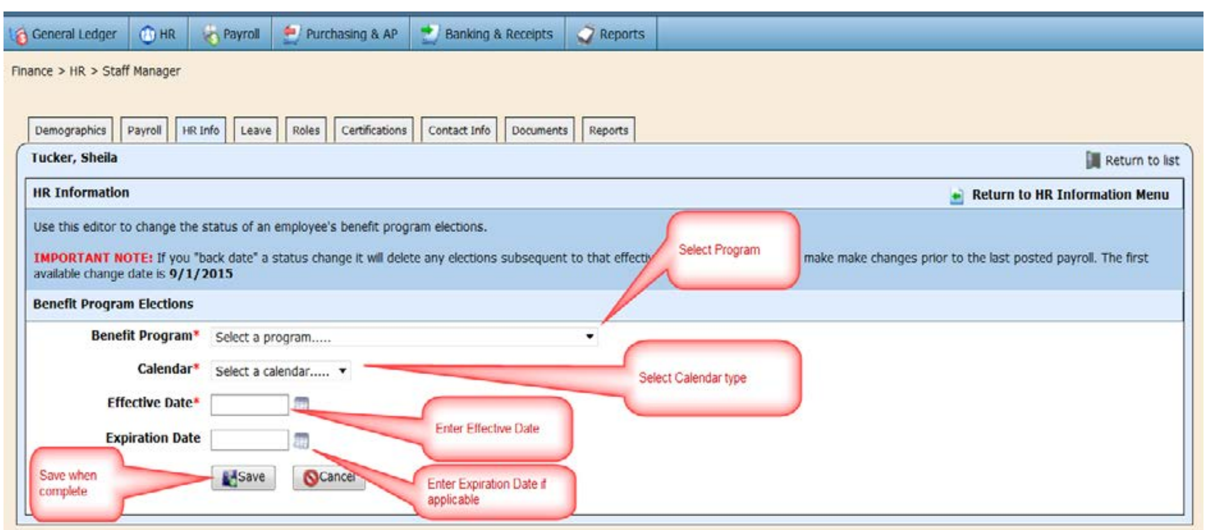


Verify the Filter is the one you need.



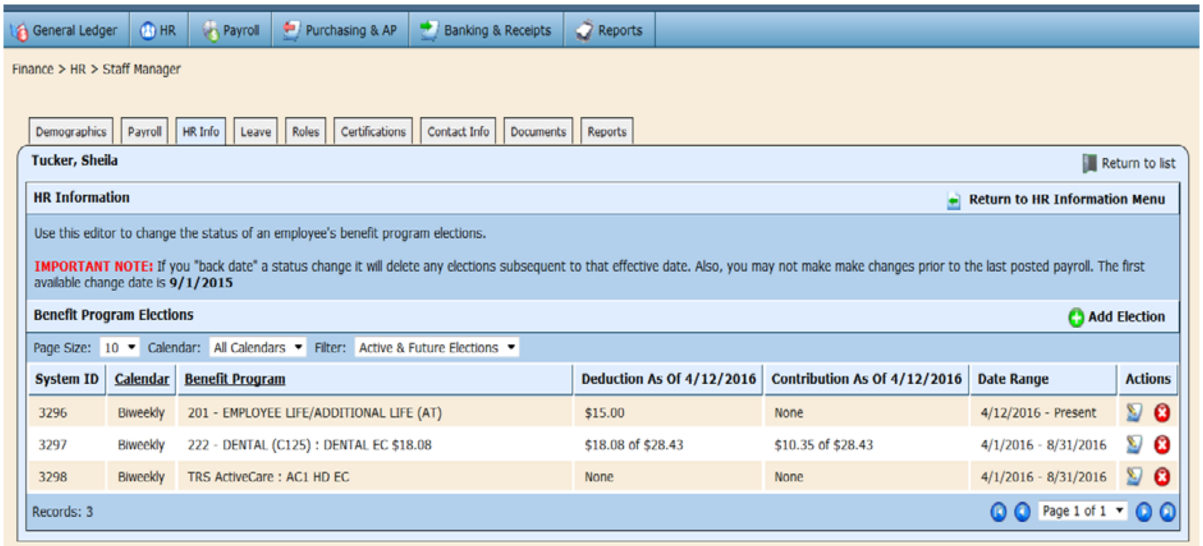
If adding an Election, fill in the information. Item descriptions are detailed below:

Click **Save**



- ➢ **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.

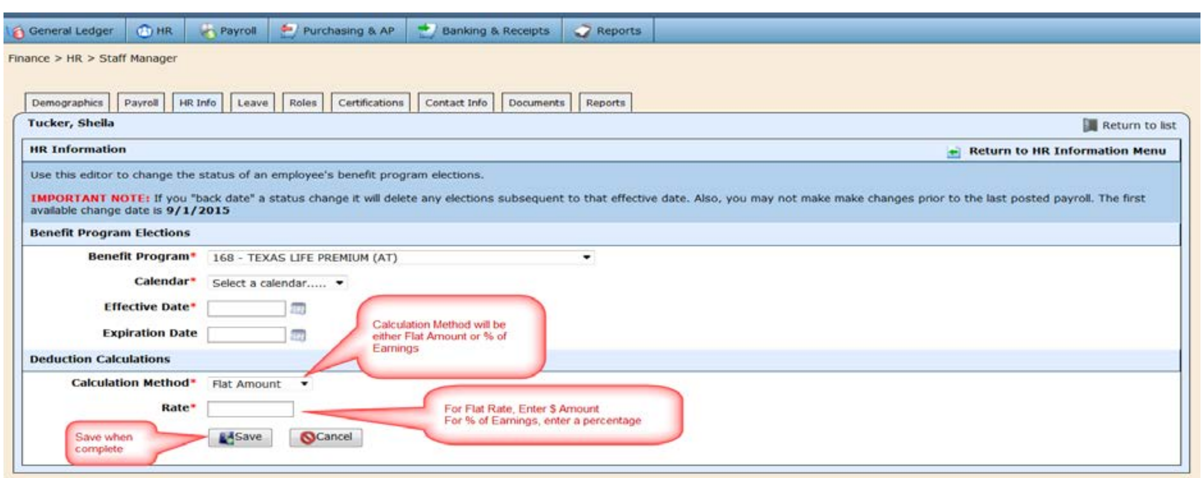
When the Election is saved, it will return to the summary screen. Verify what you have entered is correct. If not, edit the item(s) that need to be corrected.



***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

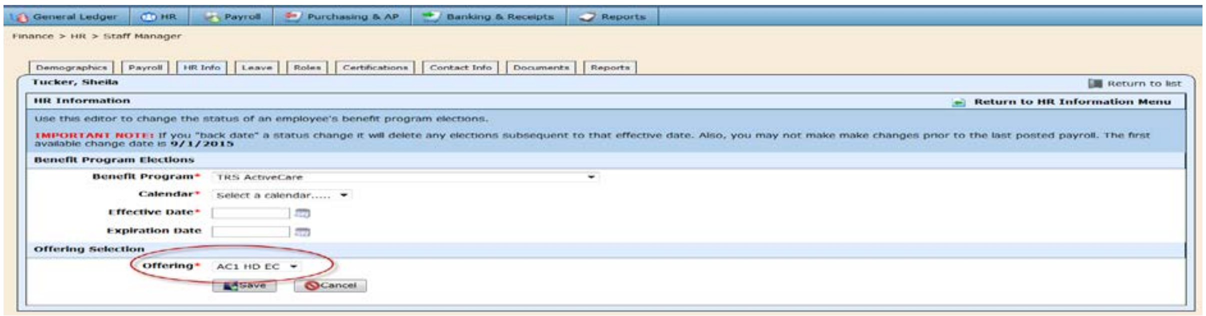
Enter the information to Calculate and the rate.



- ➢ **Benefit Program –** Select the benefit program from the drop down arrow.
- ➢ **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 percent of earnings.
- **Rate –** Enter the dollar amount if flat rate or the percent of earnings if it is a percentage.

Enter the Offering Information.



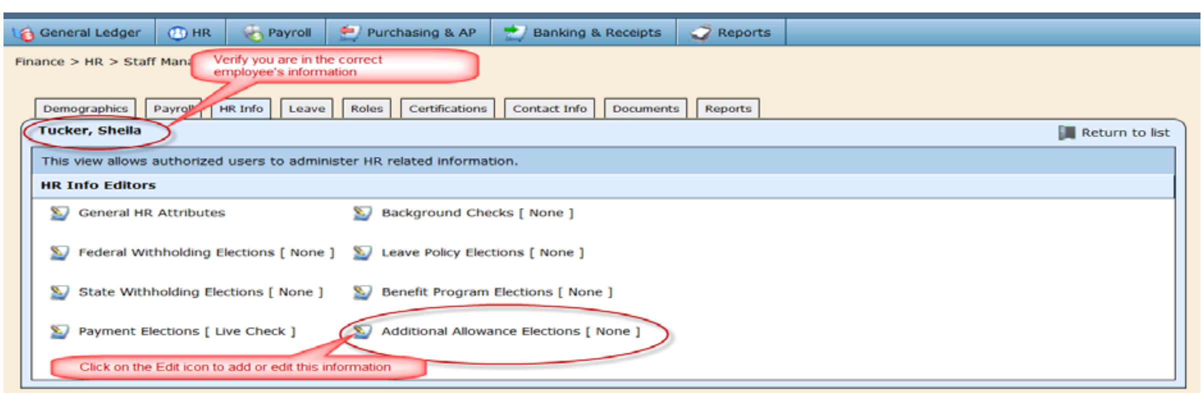
- **Benefit Program –** Select the benefit program from the drop down arrow.
- **Calendar –** Select a calendar for the benefit program.
- **Effective Date –** Enter the effective date of the benefit program.
- **Expiration Date –** Enter the expiration date of the benefit program if applicable.
- **Offering –** Select the appropriate offering for the employee. Offerings are set up in Benefit Plans with the appropriate employee deductions and employer contributions.

Click **Return to HR Information Menu**

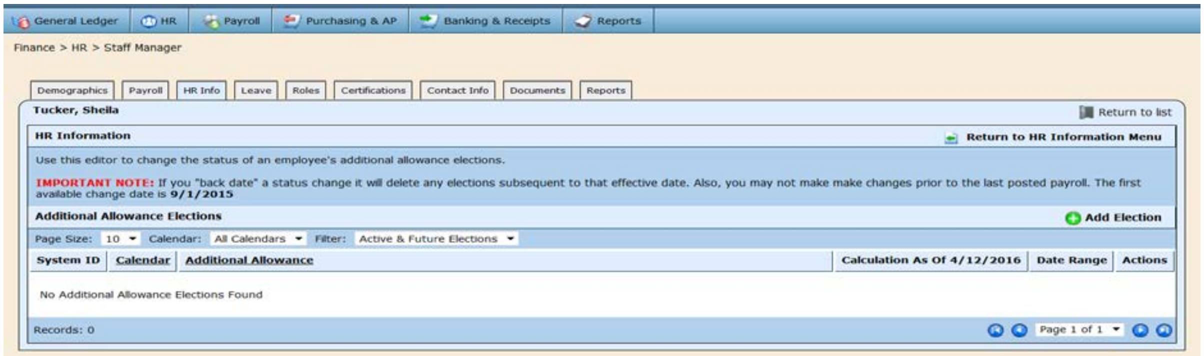
Additional Elections

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

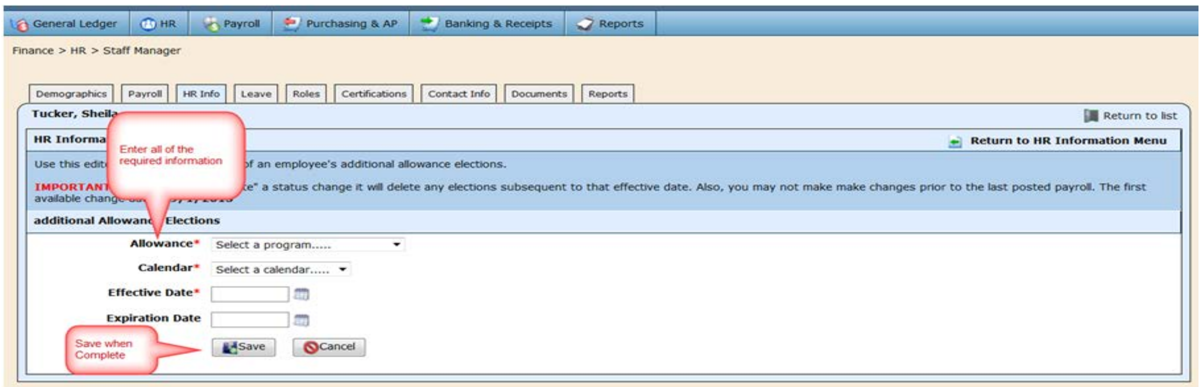
Click **Additional Allowance Elections**



Click **Add Election**

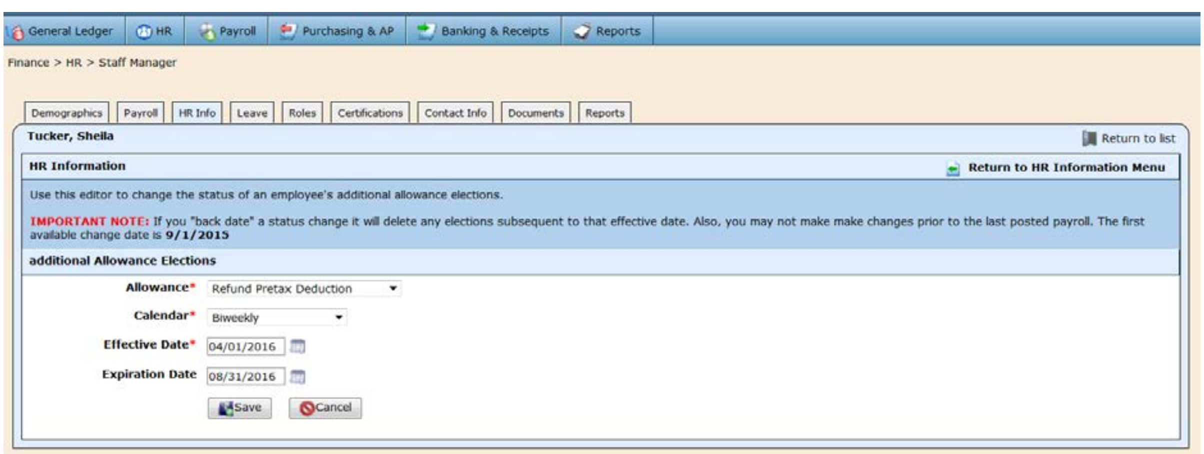


Add or Edit the information required in the fields below.



- ➢ **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.
- ➢

Click **Save**



Click **Return to HR Information Menu**

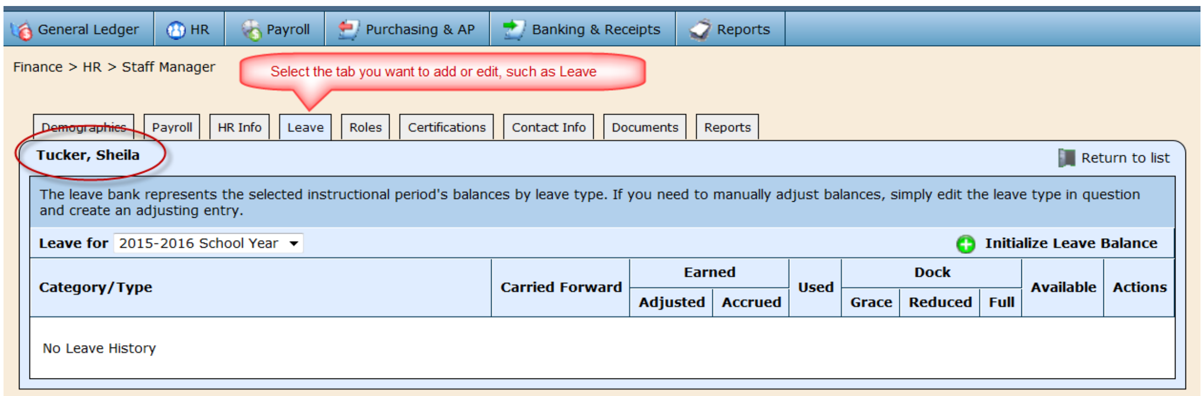
Step 4 – Leave

Initialize/Edit Balances

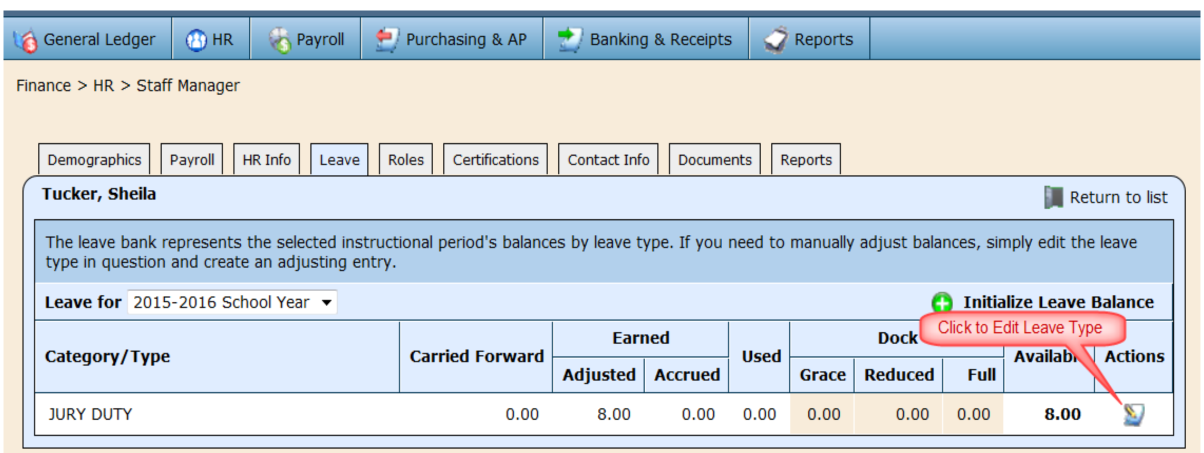
Finance *> HR > Staff Manager* **> Leave (Tab)**

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, “Search for an Existing Employee.”*

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.



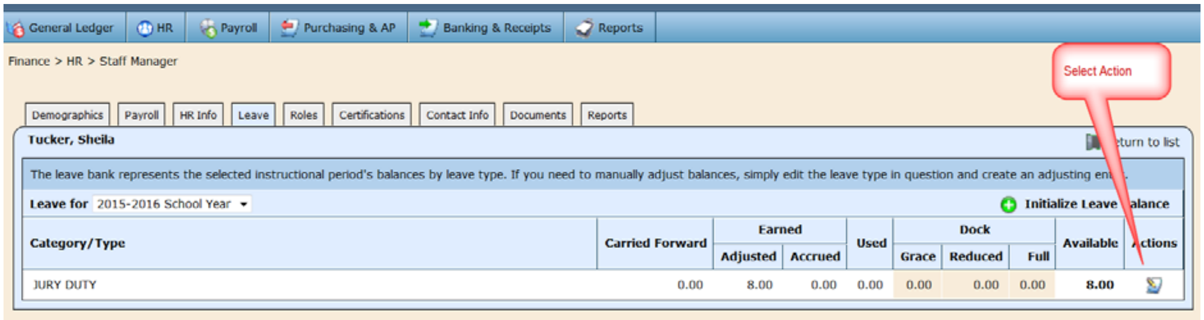
Click **Initialize Leave Balance**



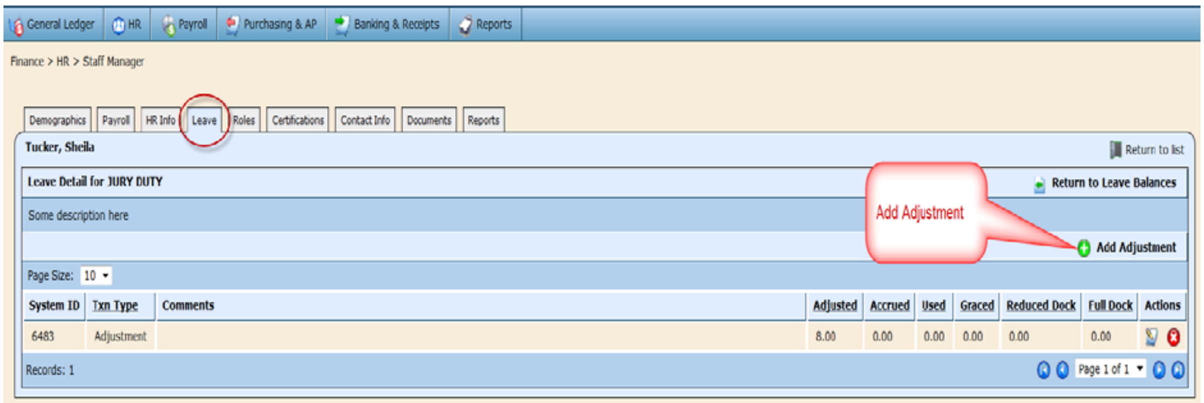
Adjustments

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 **Actions** for the type of Leave you want to adjust.

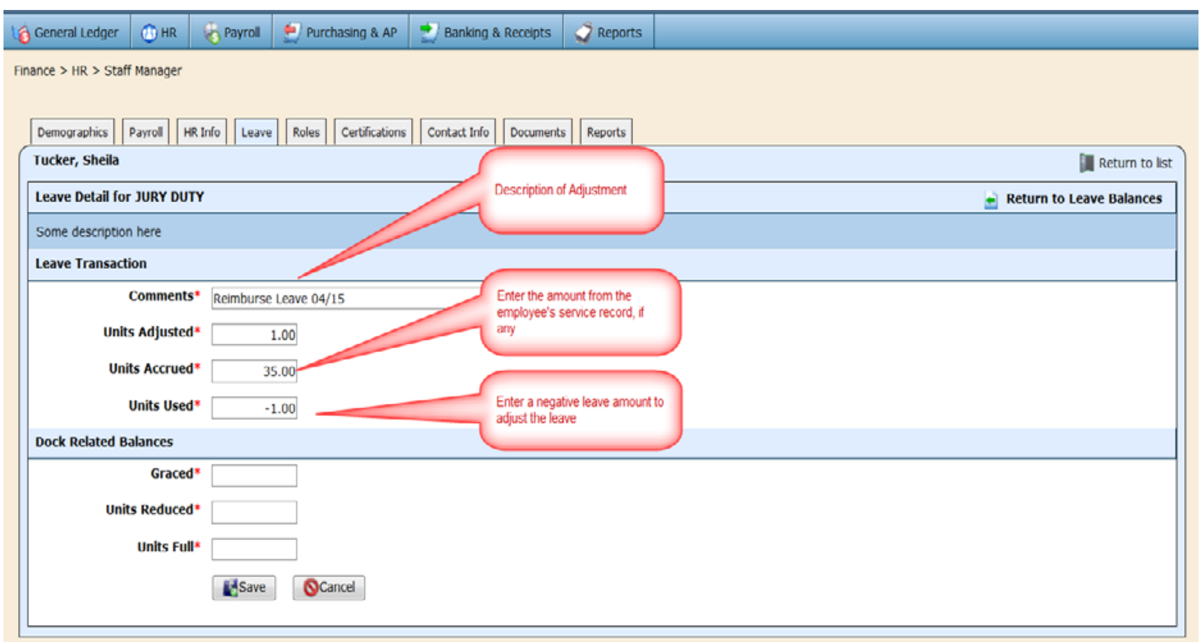


Click **Add Adjustment**



Enter the information on the screen below:

Click **Save**

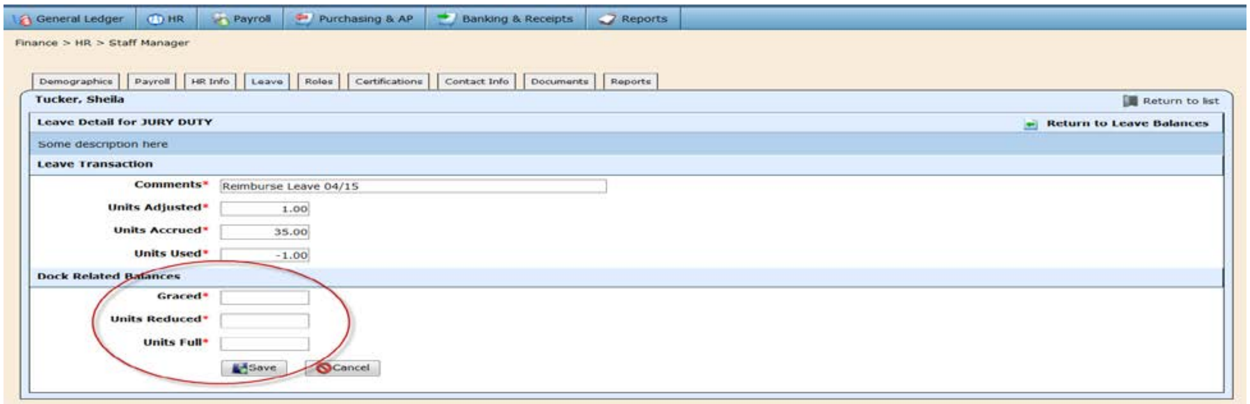


- **Comments** – enter any comments to help you identify the leave.
- **Units Adjusted** – enter the amount from the employee's service record.

- **Units Accrued –** enter the amount from the employee's service record.
- **Units Used –** enter a negative leave amount to adjust the leave. In this example, we chose to reimburse 1 day of leave.

If your school uses a Graced Dock Rate and a set reduced number of dock days, this information is entered as shown on the screen below.

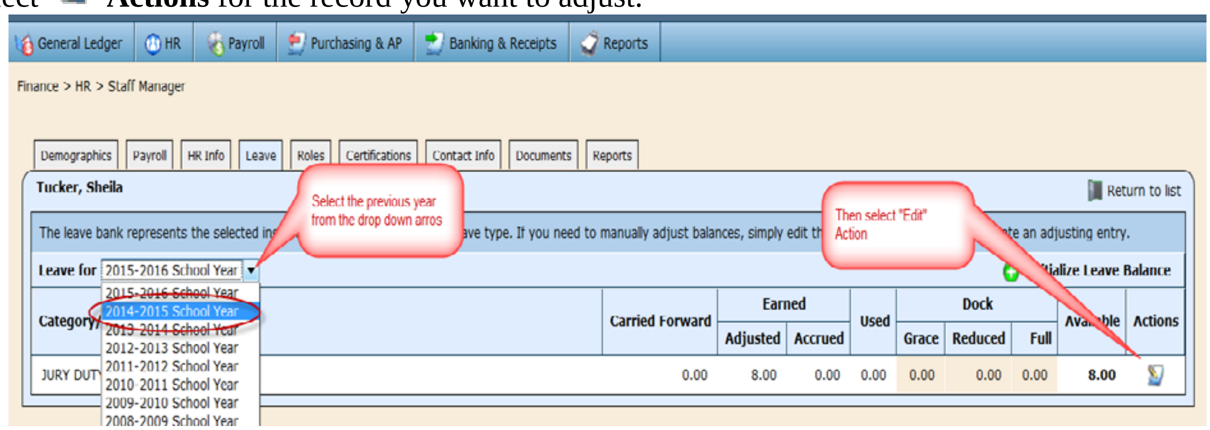
Click **Save**



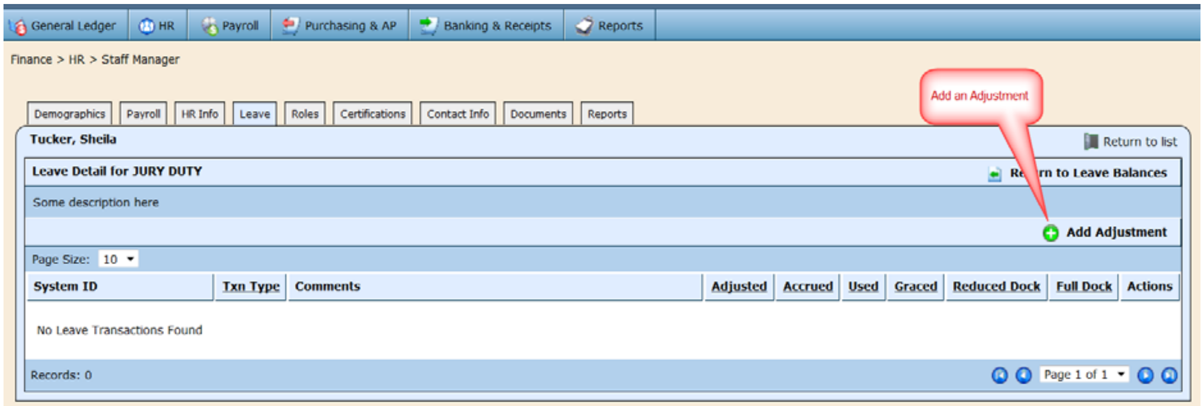
Service Record Leave Adjustment

Select the previous year. In this example we are using 2013-2014.

Select **Actions** for the record you want to adjust.



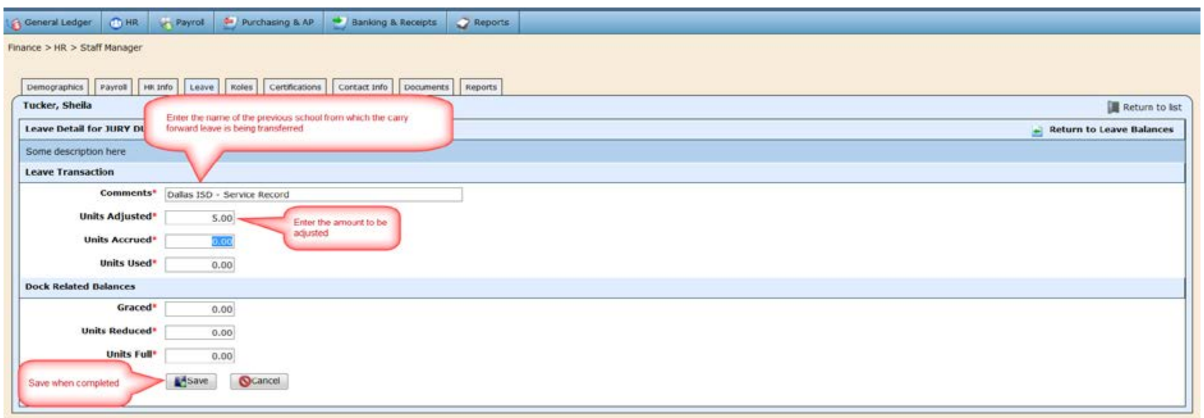
Click **Add Adjustment**



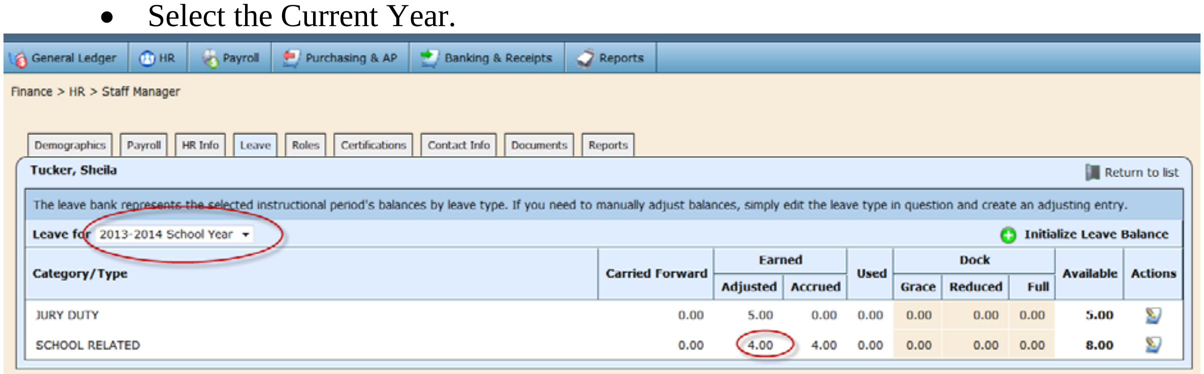
Enter **Comments** – Enter the previous school from which the carry forward leave is being transferred.

Units Accrued – enter the amount from the employee's service record.

Click **Save**



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

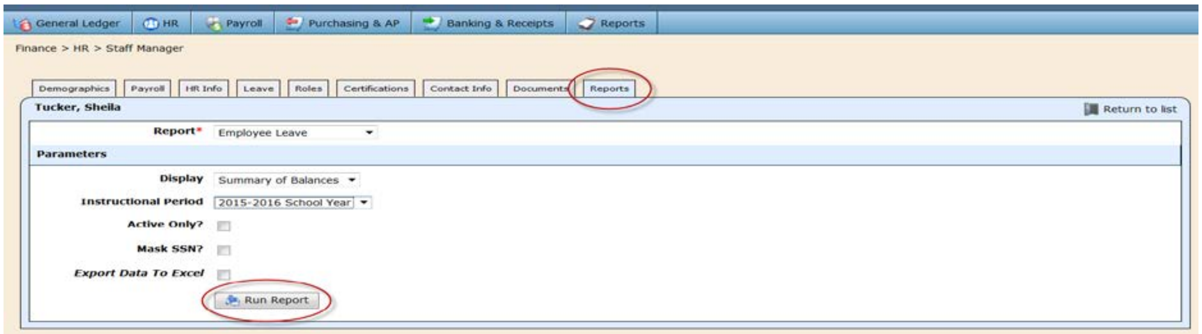


Report

Finance *> HR > Staff Manager* **> Reports (Tab)**

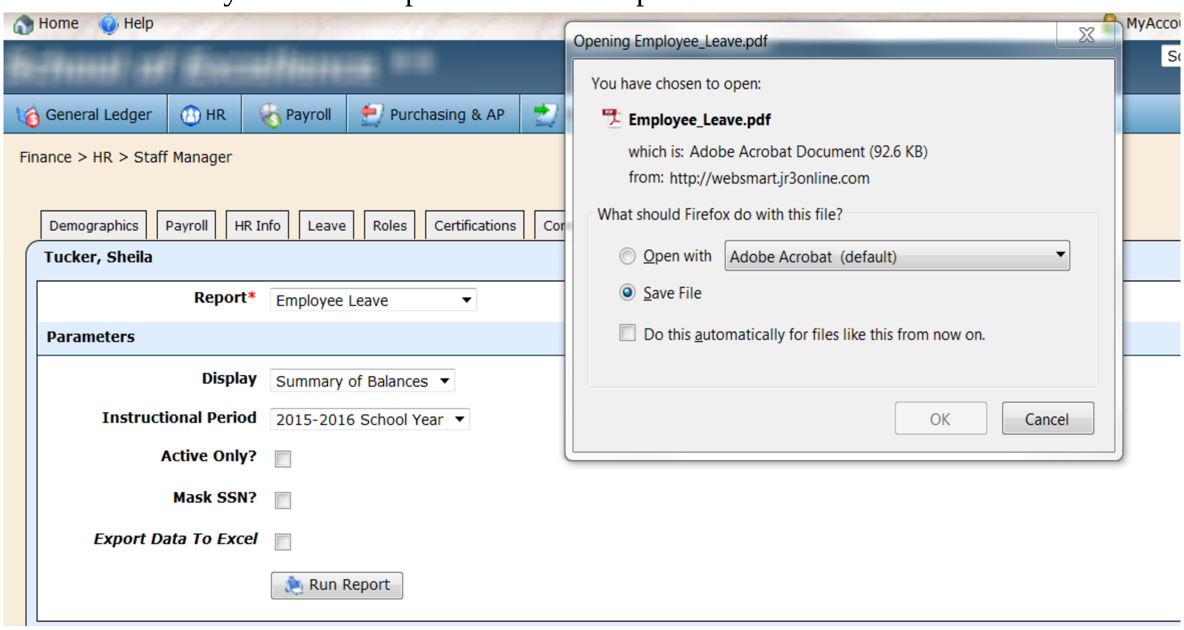
Employee Leave report – after entering the leave adjustment, you will be able to see it on the Employee Leave report.

Go to the Reports Tab .



Select "**Run Report**" to generate a Report that you can either save or open in Acrobe Acrobat.

You will be asked if you want to Open or Save the report.



If you opt to open the report in Adobe Acrobat, it will look like:

District #015806

Click on Tools, Comment and Share to access additional features.

12:07:28 AM

Employee Leave

Summary of Balances

Parameters:

Instructional Period: 2015-2016 School Year
Facility: null
Staff Member: null
Active Only: No

Leave Type	Carried	Accrued	Used	Graced	Docked	Available
Tucker, Sheila						
Contract: 09/01/2015 - 05/31/2016						
JURY DUTY Balance	5.00	8.00	0.00	0.00	0.00	13.00
SCHOOL RELATED Balance	8.00	5.00	0.00	0.00	0.00	13.00
Tucker, Sheila						
Contract: 06/01/2016 - 08/31/2016						
JURY DUTY Balance	5.00	8.00	0.00	0.00	0.00	13.00
SCHOOL RELATED Balance	8.00	5.00	0.00	0.00	0.00	13.00

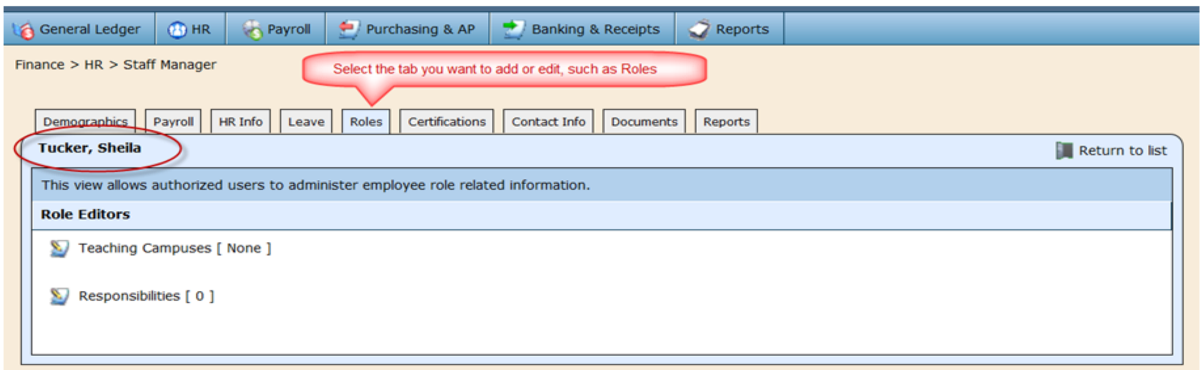
Step 5 – Roles

Roles are used to identify the campus and responsibilities of staff for PEIMS reporting purposes and access to Gradebook.

Finance *> HR > Staff Manager* **> Roles Tab**

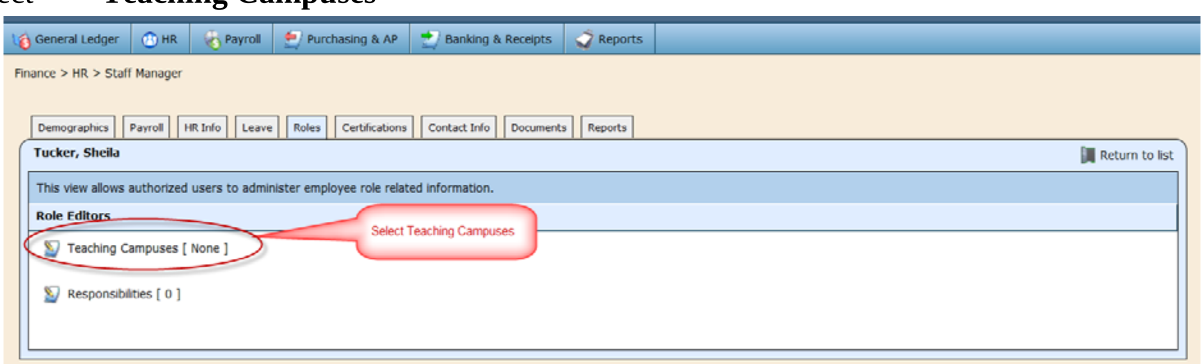
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click on the **Roles** Tab

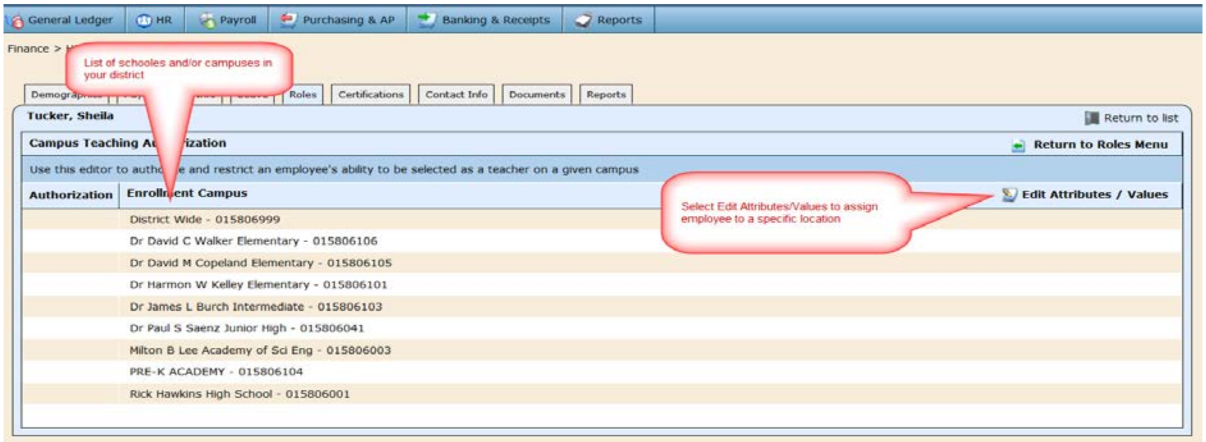


Teaching Campuses

Select **Teaching Campuses**



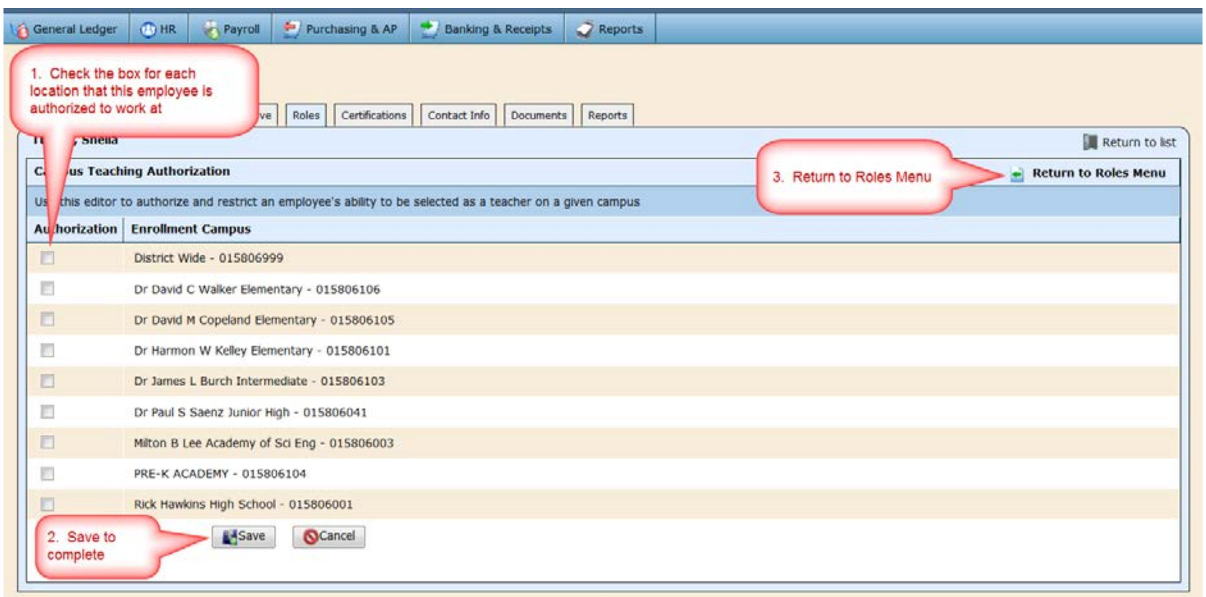
Select **Edit Attributes/Values** to assign a staff member to a campus or multiple campuses.



Assigning teachers to specific campuses will release the teacher to the scheduler module in the Student Services section of WebSmart.

Check the box for each campus to assign to the staff member.

Click **Save**

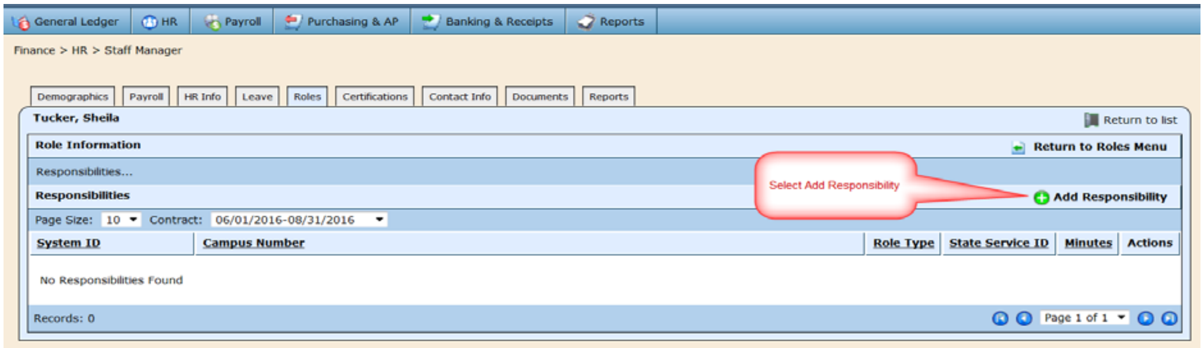


Return to Roles Menu

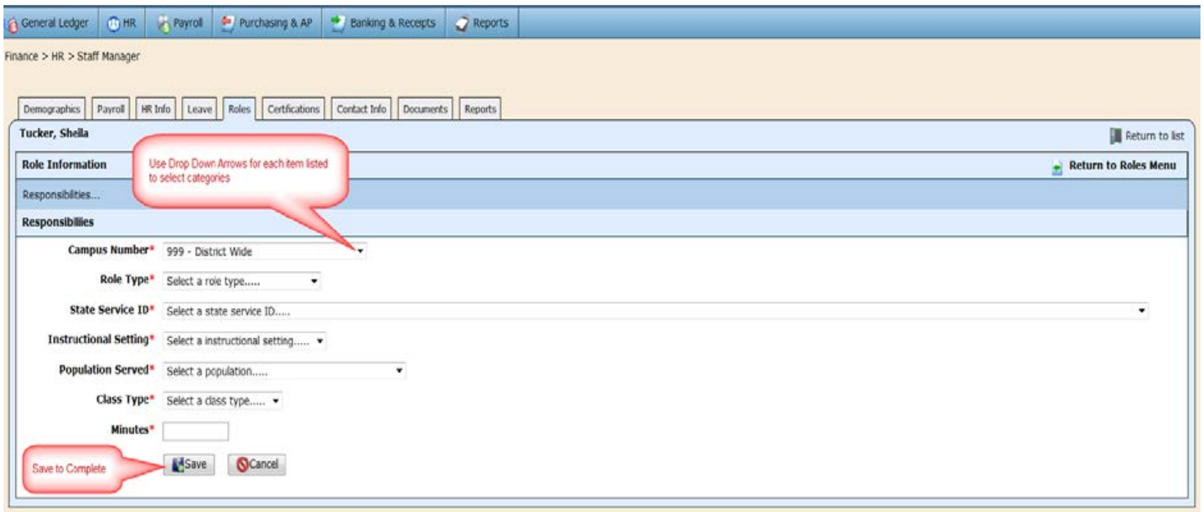
Responsibilities

Teacher responsibilities will be released from the schedule module during the PEIMS process. You will need to add responsibilities for all PEIMS reportable staff that are NOT teachers. See the PEIMS Data Standards page for further clarification. Click Here

Click **Add Responsibility**



Use the drop down arrow for each item to complete the Responsibilities.

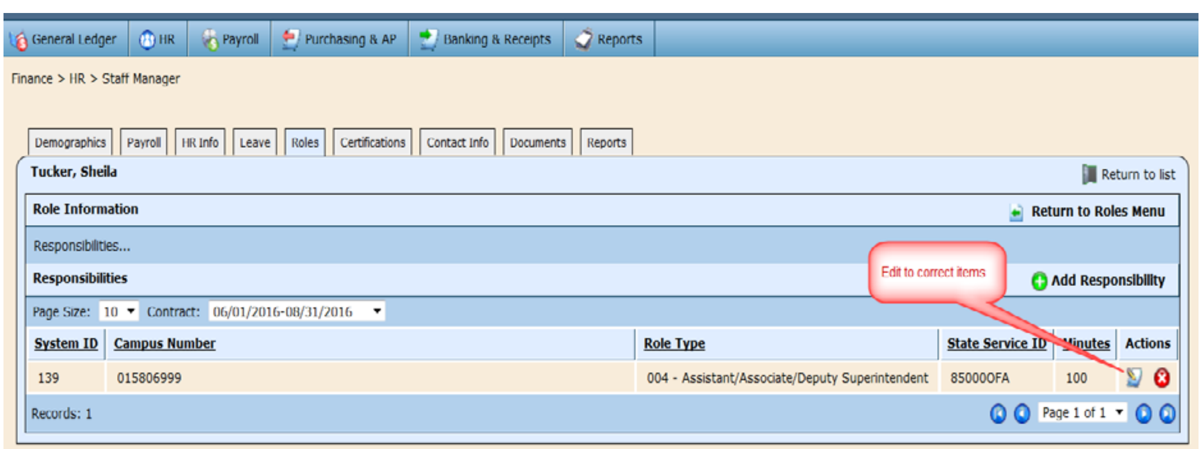


This will bring you to a summary screen. Please verify the information you have entered is correct before proceeding to the next section.

Select to edit the role responsibility

OR

Select to delete the role responsibility



Step 6 - Certifications

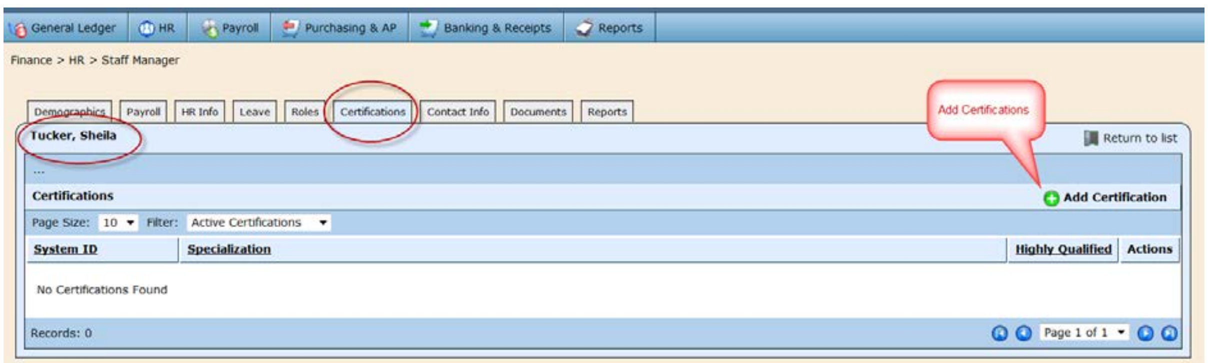
Some courses require an employee be certified. In this section, Certifications identify the course(s) an employee is eligible to teach and where the certification was obtained.

Adding Certifications

Finance > *HR* > *Staff Manager* > Certifications Tab

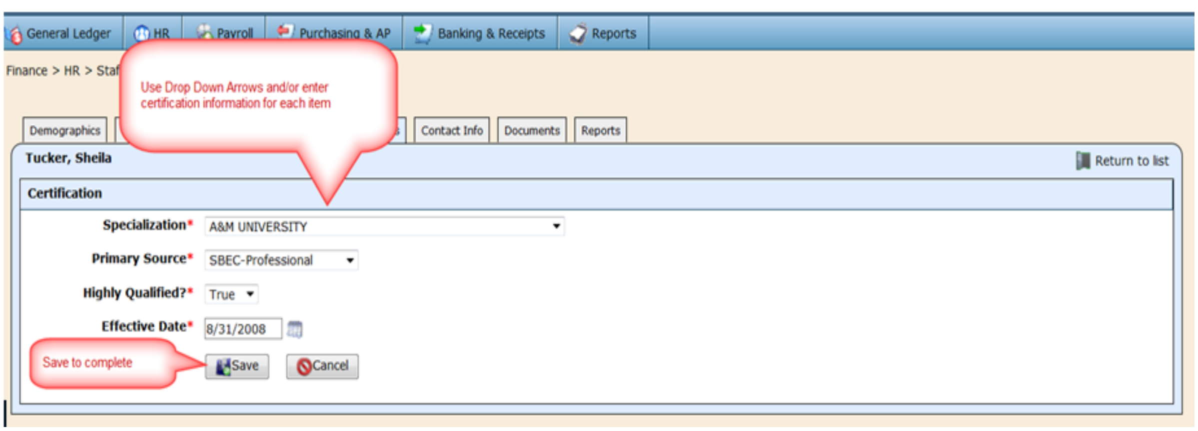
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, “Search for an Existing Employee.”*

Click **Add Certification**



It brings you to a screen where you may select options.

Click **Save**

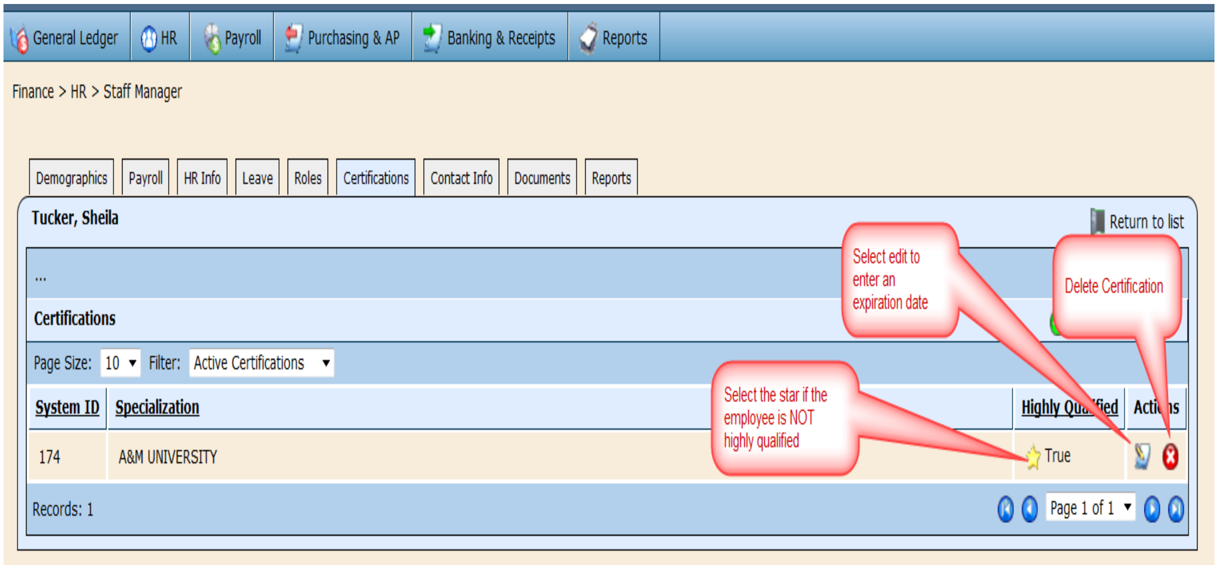


- **Specialization –** Select a specialization from the drop down arrow. This will be on the employee’s teaching certificate.
- **Primary Source –** Select the source of the specialization from the drop down arrow.

- **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.

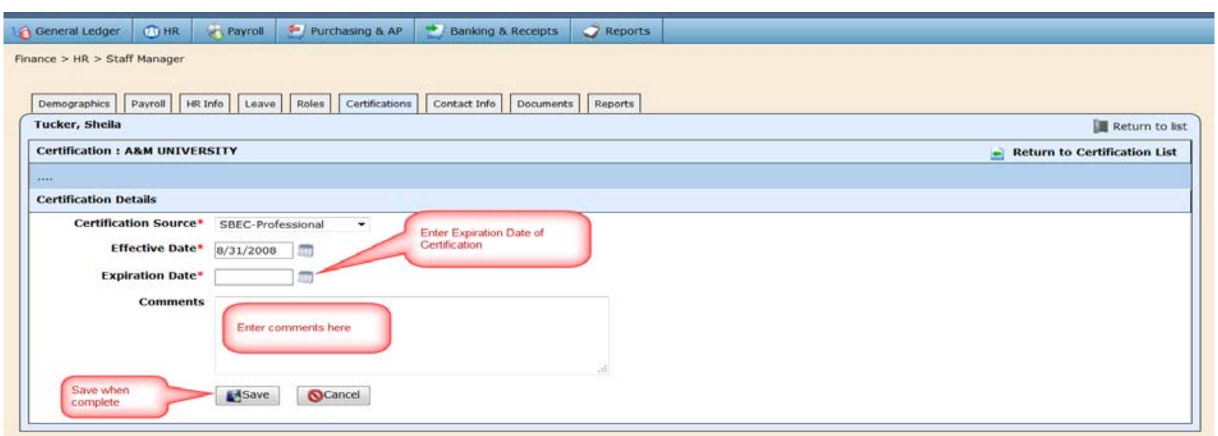
You will then see a summary screen.



- **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.
- **Expiration Date** – enter the expiration date of the certification.

Enter any qualification expiration or certificate expiration dates.

Click **Save**



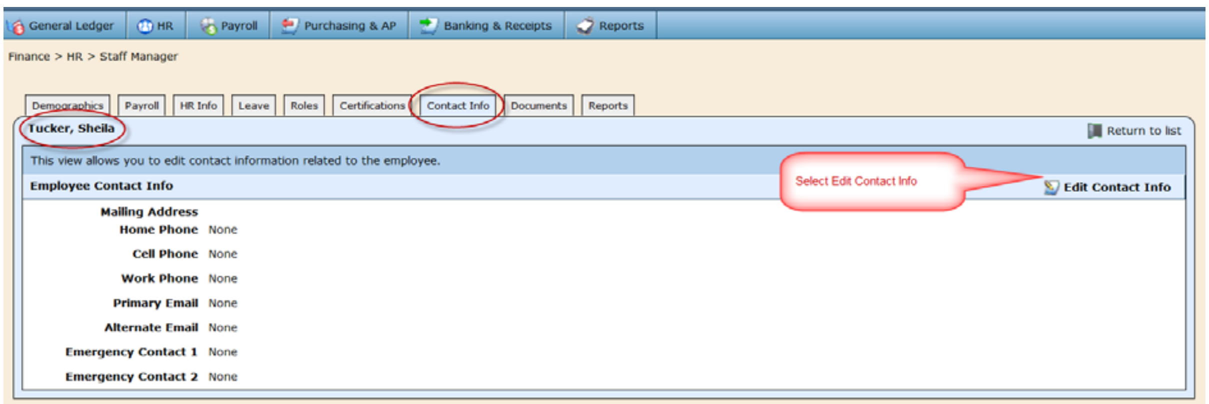
Step 7 – Contact Info

The Contact Info section contains all of the employee's personal contact information such as mailing address, phone numbers, email and emergency contact(s).

Finance *> HR > Staff Manager >* ***Contact Info Tab***

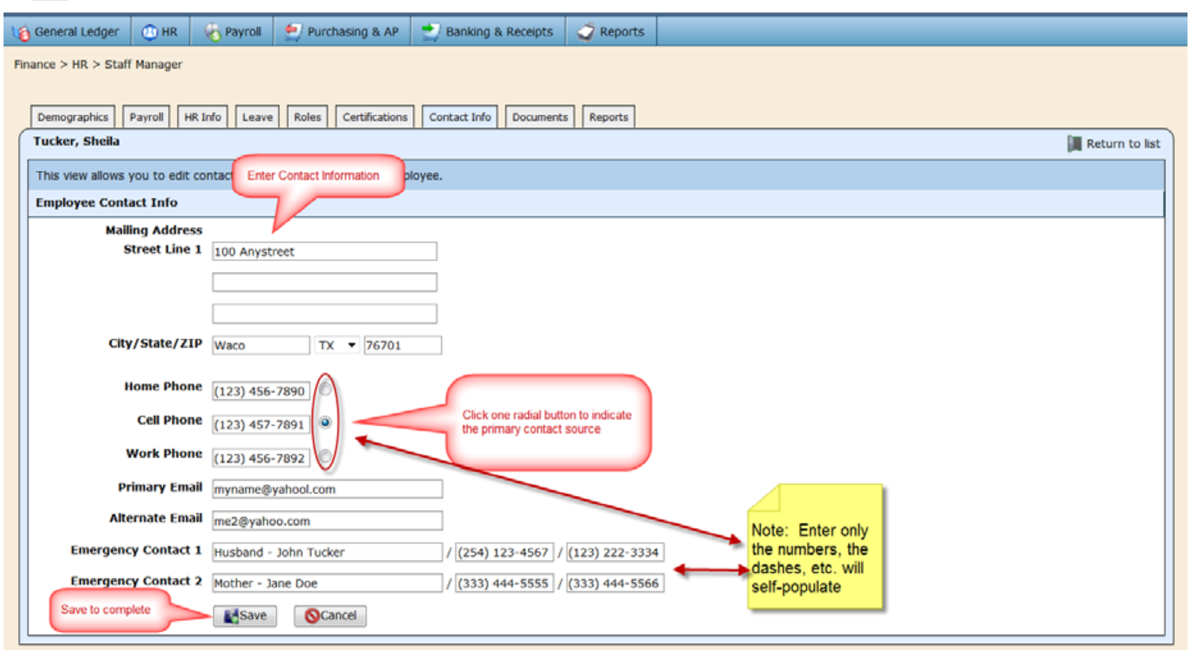
***Verify you are on the employee record you need to set-up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click **Edit Contact Info**

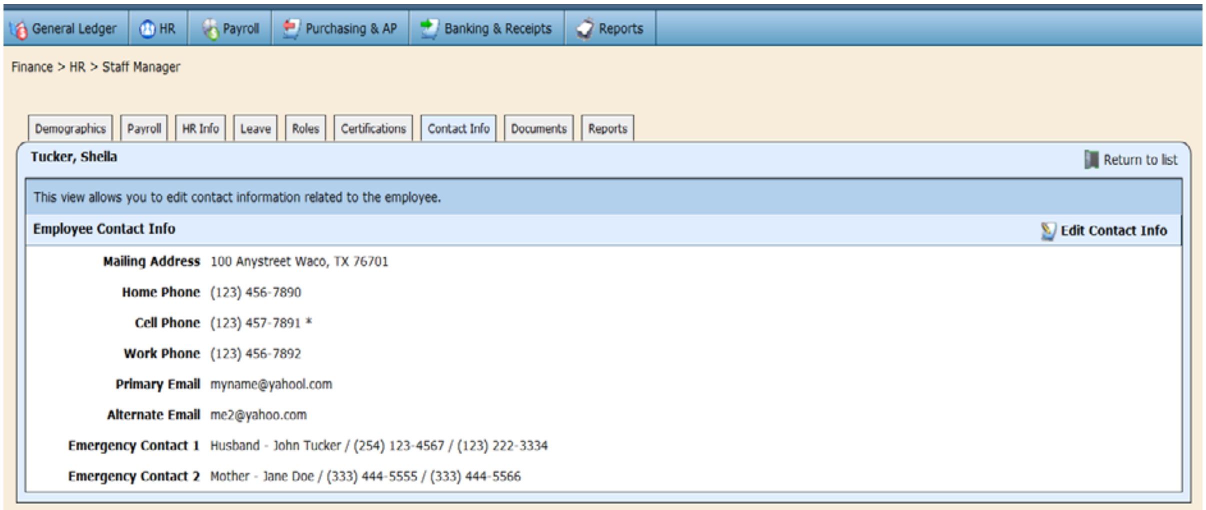


Enter all of the employee's contact information.

Click **Save**



You will see a Summary Screen. Verify all of the information you entered is correct. If not, Edit Contact Info.



Step 8 - Documents

WebSmart-*i* gives you the advantage of being able to upload your documentation and other files directly into WebSmart. This is useful in keeping all of the employee's information in one place.

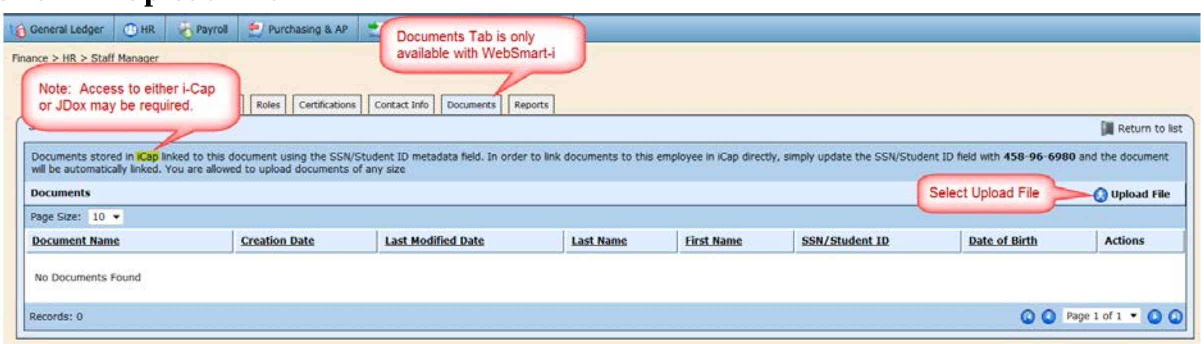
- Documents – if you have purchased WebSmart-*i*, you will see a Documents tab and have the ability to upload the personnel file here.
- You are allowed to upload documents of any size.

Adding Documents

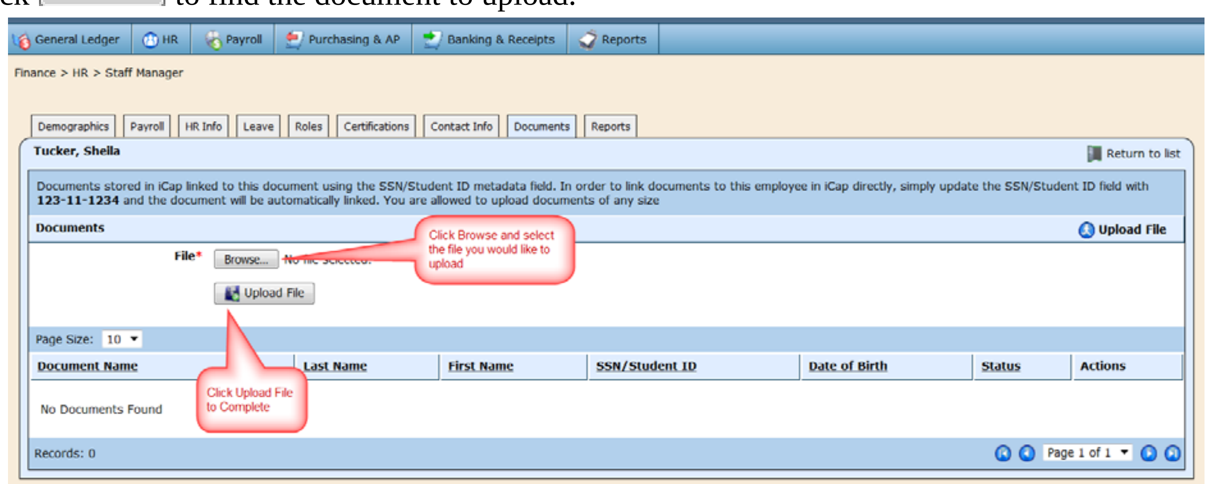
Finance > *HR* > *Staff Manager* > Documents Tab

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Click on **Upload File**

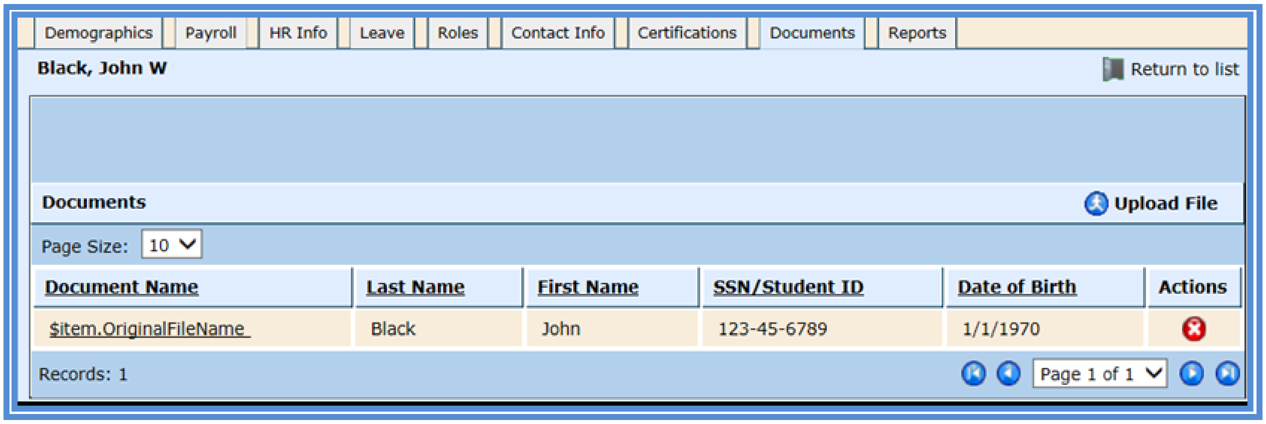


Click Browse... to find the document to upload.



Click 

You will then see a summary screen of all of the items you have uploaded and attached to the employee's documentation.



Step 9 - Reports

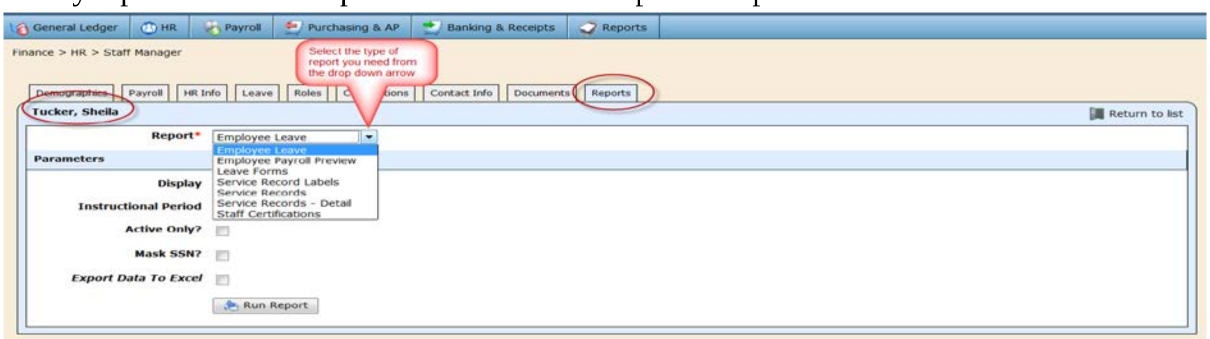
The Reports section provides access to many reports from the employee's HR screen.

- New Reports available in WebSmart –
  - Employee Payroll Preview – this was previously found on the employee's Position History screen.
  - Staff Certifications – lists all certifications for that staff member.

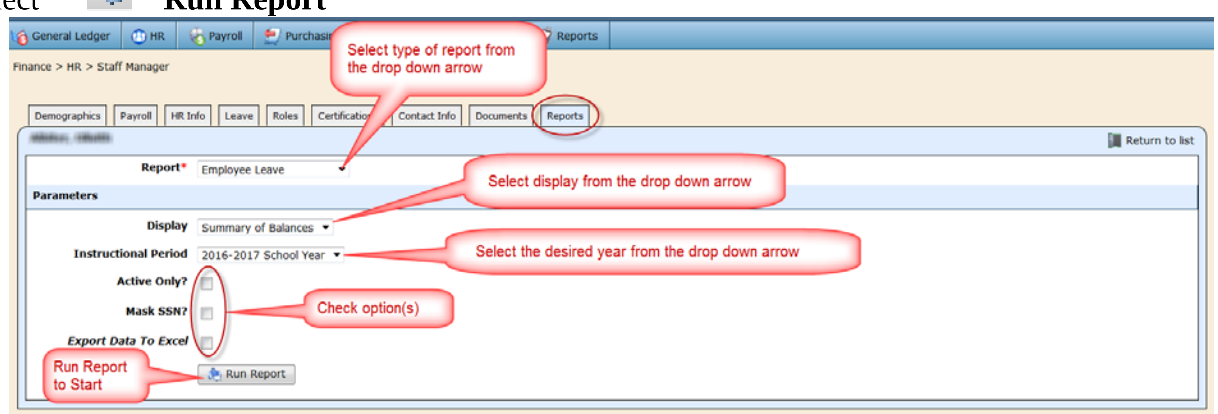
Finance > *HR* > *Staff Manager* > Reports

***Verify you are on the correct employee record. If you are not, refer to Chapter 1, "Search for an Existing Employee."*

Select any report from the drop down arrow and complete the parameters.



Select  **Run Report**



Report – Select the type of report from the drop down arrow.

- **Display** – Select Summary of Balances or Detailed List from the drop down arrow.
- **Instructional Period** – Select the school year from the drop down arrow.
- **Active Only?** - will give only active data.

- **Mask SSN? –** will not include Social Security Number.
- **Export Data to Excel –** Check this box if you want the report run to Excel.

Click **Run Report**

The excel report should look similar to the one below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	LineType	Employme	StaffName	SSN	ContractBe	ContractEı	LeaveType	LeaveType	UnitsCarri	UnitsAccrı	UnitsUsed	UnitsGrace	UnitsRedu	UnitsFullD	UnitsAvail	DockOnOr	ContractM	ContractY	LeaveTran	PayrollBat	Comments
2	Detail	2380	Tucker, St	***-**-123	09/01/201	05/31/201		BEREAVE		0	8	0	0	0		########	4	2015	Standard	0	Death of immed
3	Total	2380	Tucker, St	***-**-123	09/01/201	05/31/201		BEREAVE	0	0	8	0	0	0	0					0	
4	Detail	2380	Tucker, St	***-**-123	09/01/201	05/31/201		JURY DUT		8	0	0	0	0			0	0	Adjustmen	0	
5	Total	2380	Tucker, St	***-**-123	09/01/201	05/31/201		JURY DUT	5	8	0	0	0	0	13					0	
6	Detail	2380	Tucker, St	***-**-123	09/01/201	05/31/201		SCHOOL I		5	0	0	0	0			0	0	Adjustmen	0	
7	Total	2380	Tucker, St	***-**-123	09/01/201	05/31/201		SCHOOL I	8	5	0	0	0	0	13					0	

Chapter 3
Organization

The Organization section will identify and label the types of positions and contracts for each employee.

Position Types

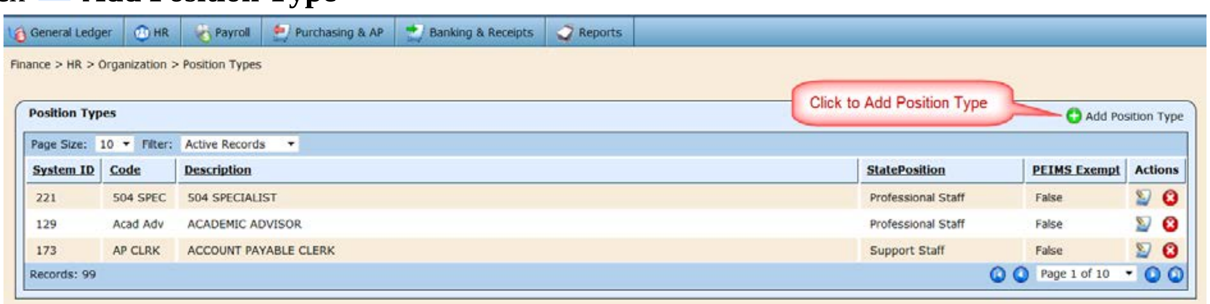
A position type maps a state-defined TRS position to a locally implemented position type. This categorization is critical to the following areas:

- ✓ These position templates are used when setting up a new position on an employee in Finance > HR > Staff Manager > Contracts during the payroll process for TRAQS and PEIMS reporting.
- ✓ Primary role on Contracts. Reports on TRAQS ED40.
- ✓ Positions trigger reporting on PEIMS Fall submissions.

Add Information

Finance *> HR > Organization > Position Types*

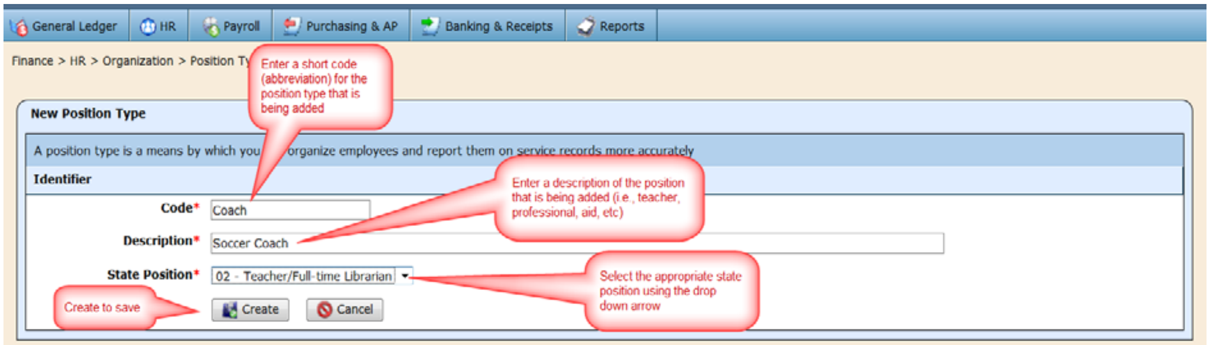
Click **Add Position Type**



You will see the screen to set up a new Position Type.

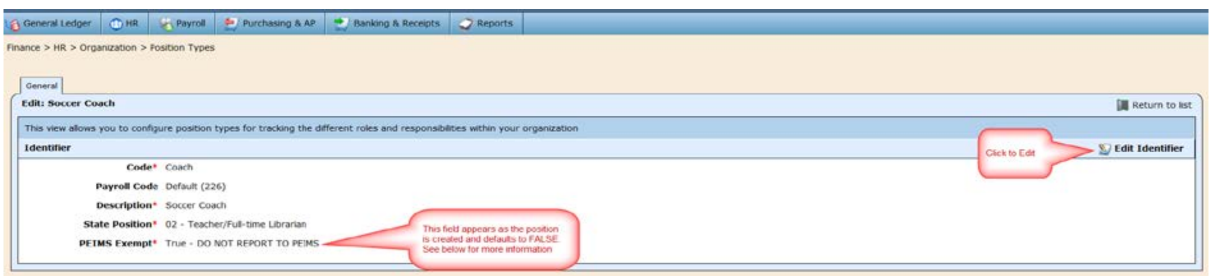
Enter all of the information.

Click Create



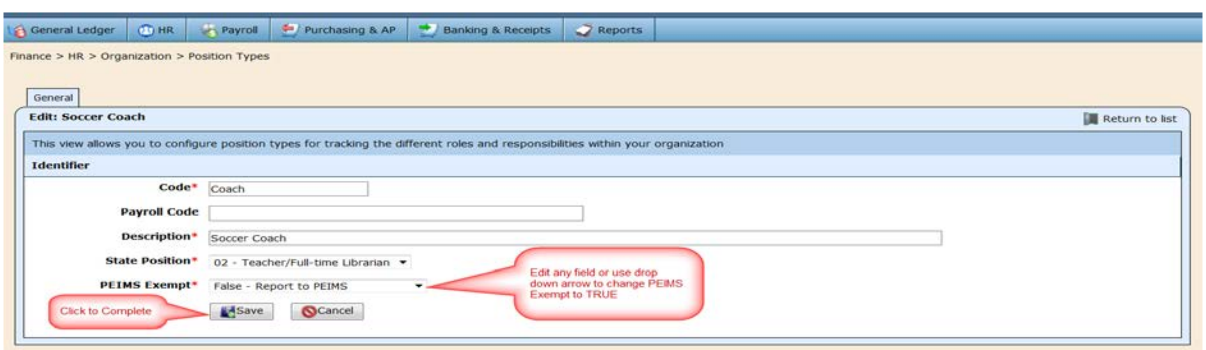
- **Code –** Enter a short code (abbreviation) for the position type that is being added. This will print on the employee's service record (up to 10 characters).
- **Description –** Enter a description of the position that is being added. For example: Teacher, Professional, Aide, Maintenance.
- **State Position –** Select the appropriate state position from the drop down box.

Once the Position Type is created, it will bring you to a summary screen. Please verify the information you have entered is correct.



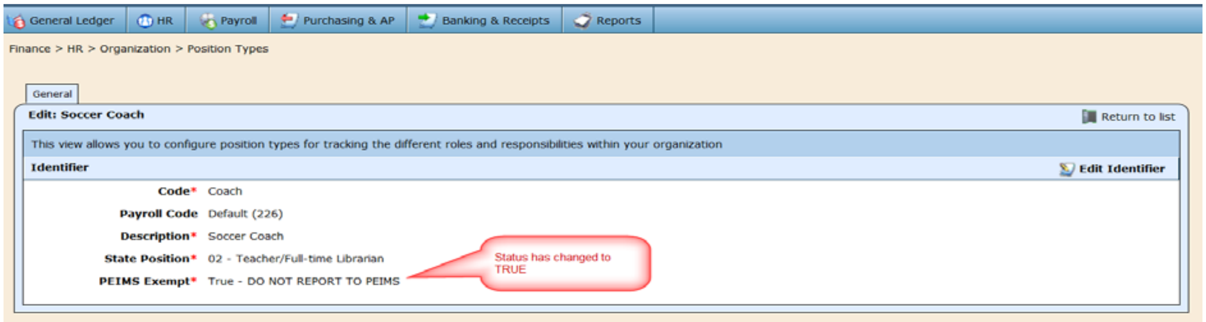
** **PEIMS Exempt –** This field appears as the position type is created. It will always default to – FALSE – Report to PEIMS. If this position is PEIMS exempt, such as a substitute:

Click **Edit Identifier**



- **PEIMS Exempt –** Select TRUE – DO NOT REPORT TO PEIMS from the drop down menu.

Click **Save**

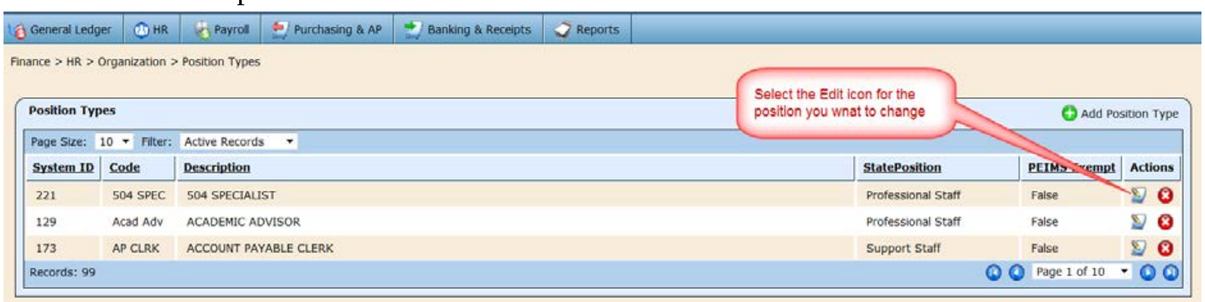


Once the Position Type is edited, it will bring you to a summary screen. Please verify the information you have entered is correct. If it is not, see the instructions to Edit a Position Type.

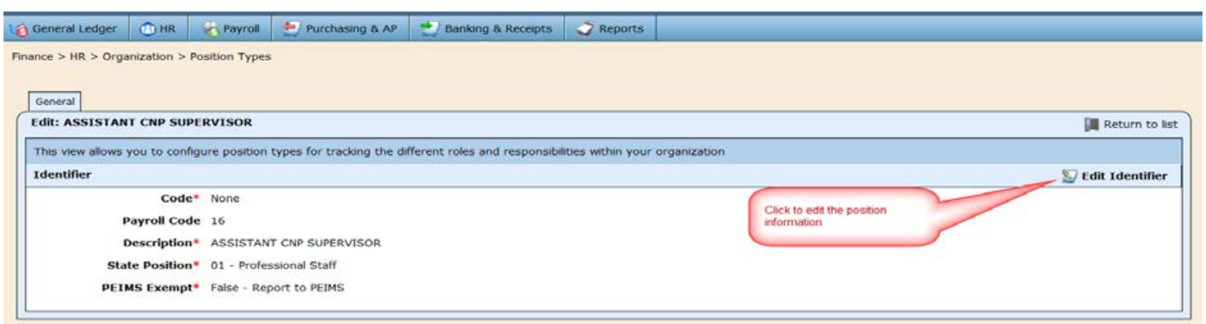
Edit Position

Finance *> HR > Organization > Position Types*

Click next to the position that will be corrected.

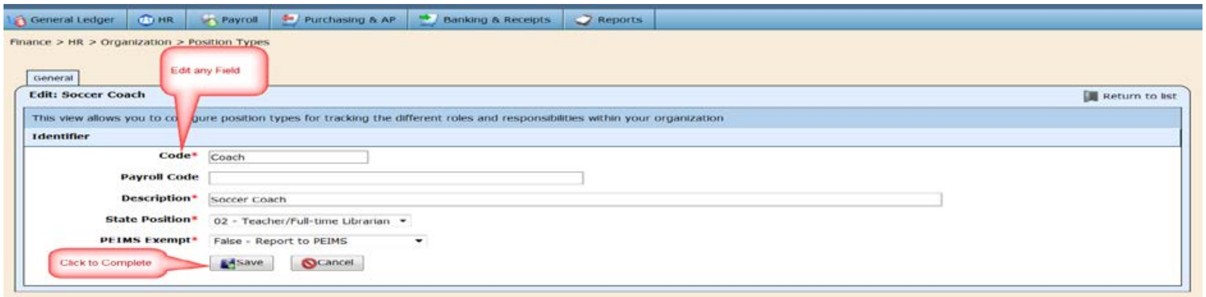


Click **Edit Identifier**



Correct the appropriate fields.

Click **Save**

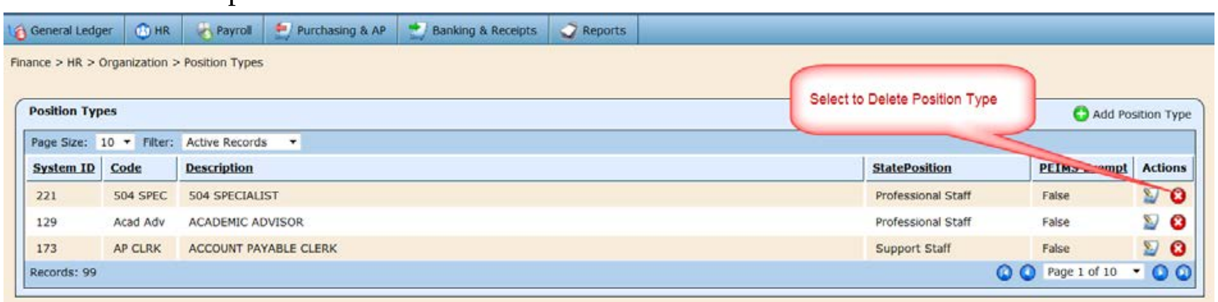


Delete a Position

Do not delete a Position Code that has active employees attached, as it may generate errors in payroll and other mandatory reporting requirements.

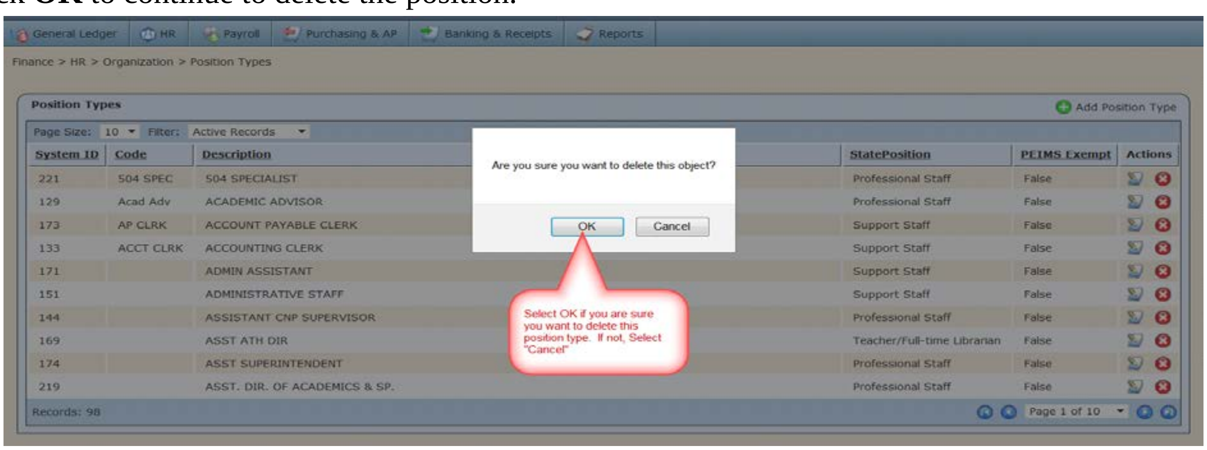
Finance* > *HR* > *Organization* > *Position Types

Click next to the position that will be deleted.



You will be asked to confirm before the position is deleted.

Click **OK** to continue to delete the position.



Click **OK** to continue to delete the position.

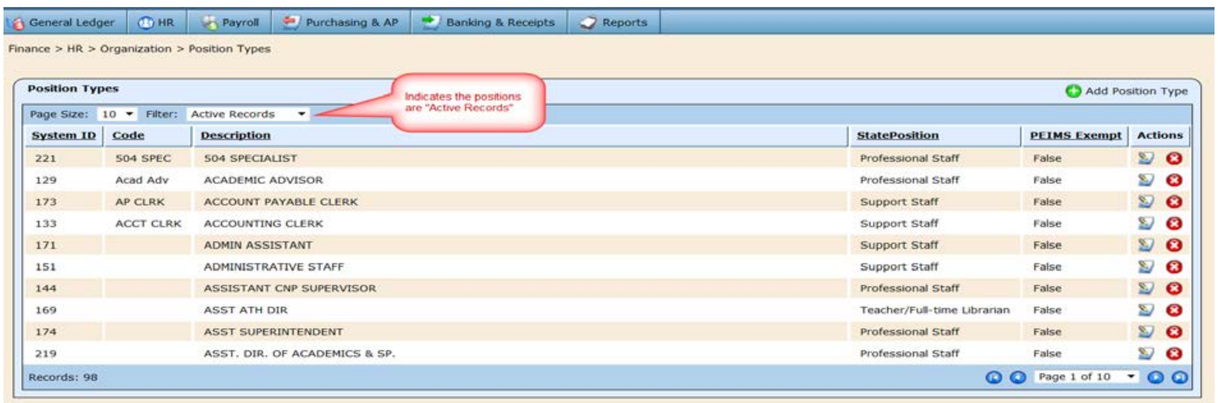
Restore a Deleted Position

***Finance** > HR > Organization > Position Types*

If a position has been deleted but has never been used during a payroll process it will be permanently deleted.

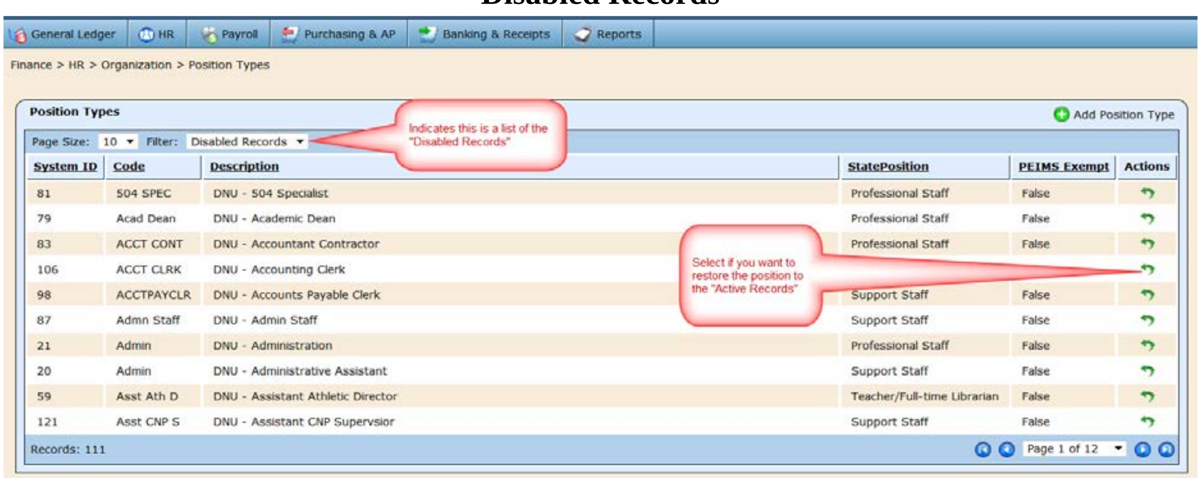
If a position has been used during one or more payroll processes, then the deleted position moves from the <u>active</u> records to <u>disabled</u> records. If this position was deleted in error, follow the following steps to restore the position.

Active Records



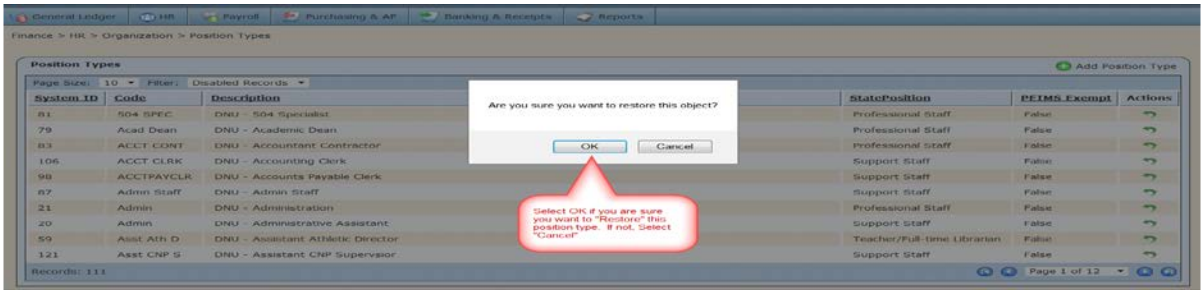
Select Disabled Records from the **Filter** drop down box.

Disabled Records

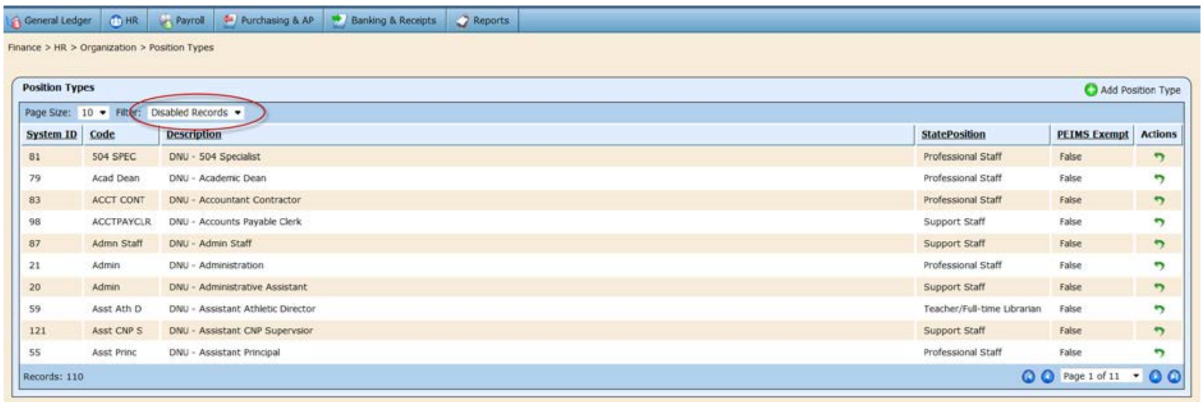


Click on  to restore to the position.

Click **OK** to continue to restore the position.



You will no longer see the position in the Disabled Records.



It has been restored and can be located in the active records.

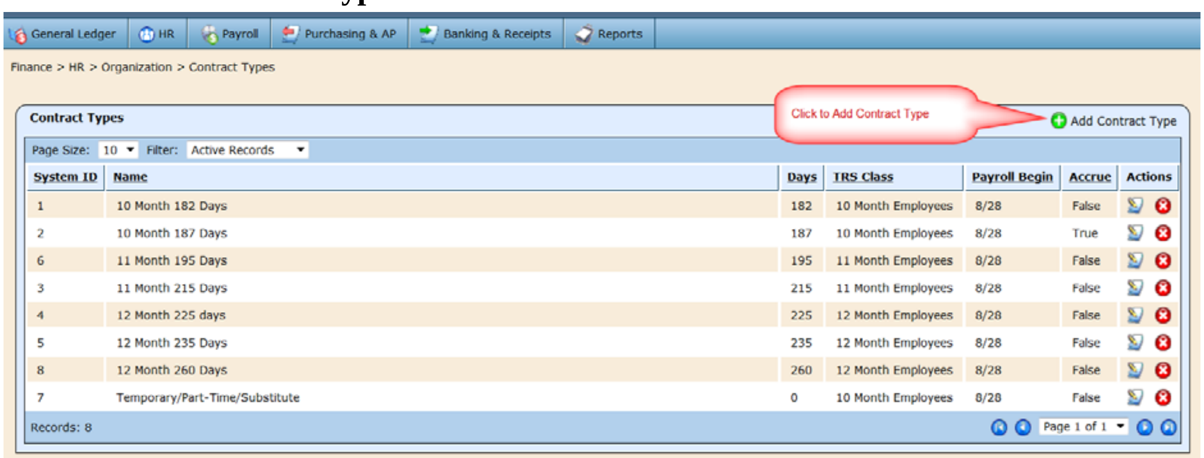
Contract Types

Contract types are created to identify the number of days an employee works, the number of paychecks the employee will receive for the instructional period, and whether or not the employee's salary should calculate for accruals. **Important Note…Do NOT Create a new contract type for an employee that has been hired mid-year. Select one of the standard annual contract types.

Adding a Contract Type

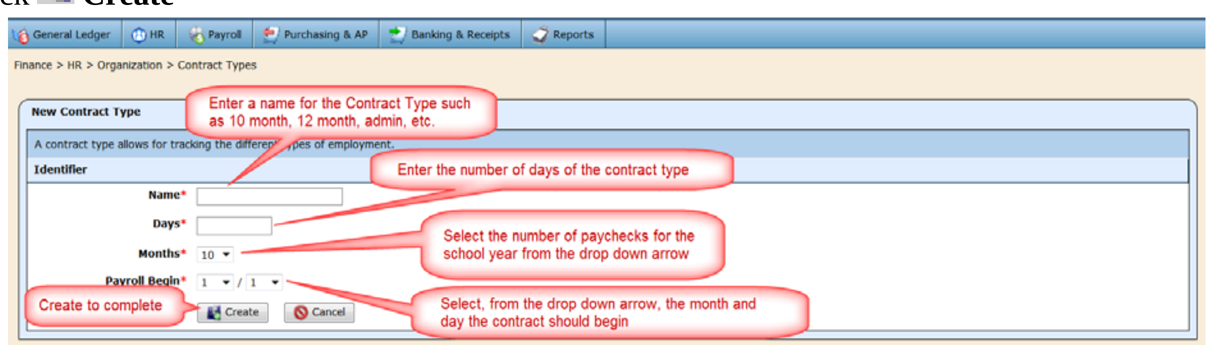
Finance > HR > Organization > Contract Types

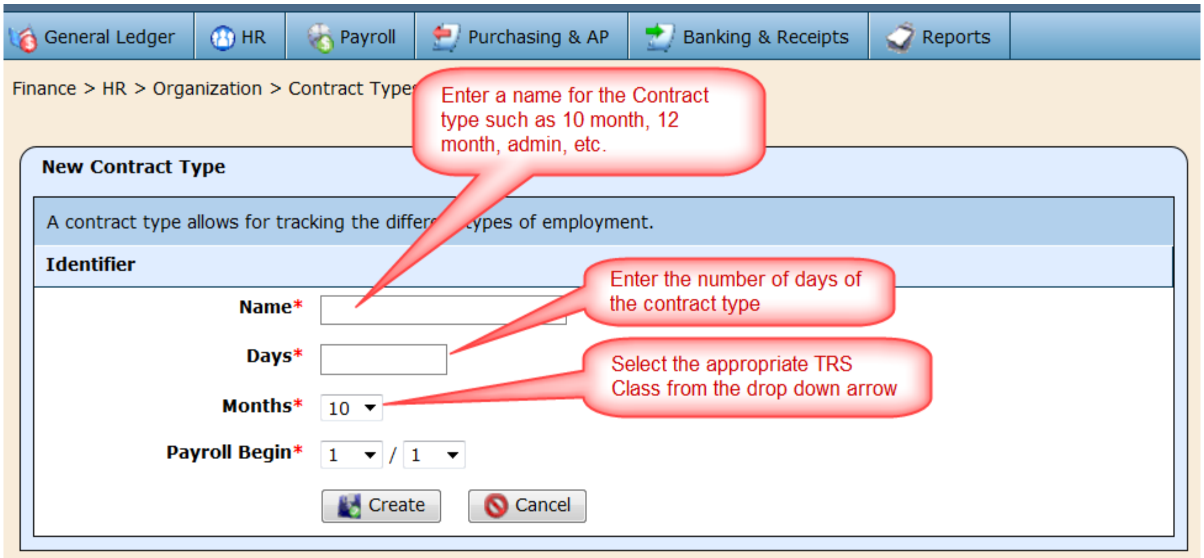
Click on **Add Contract Type**



Enter the information in all of the fields (descriptions below).

Click **Create**



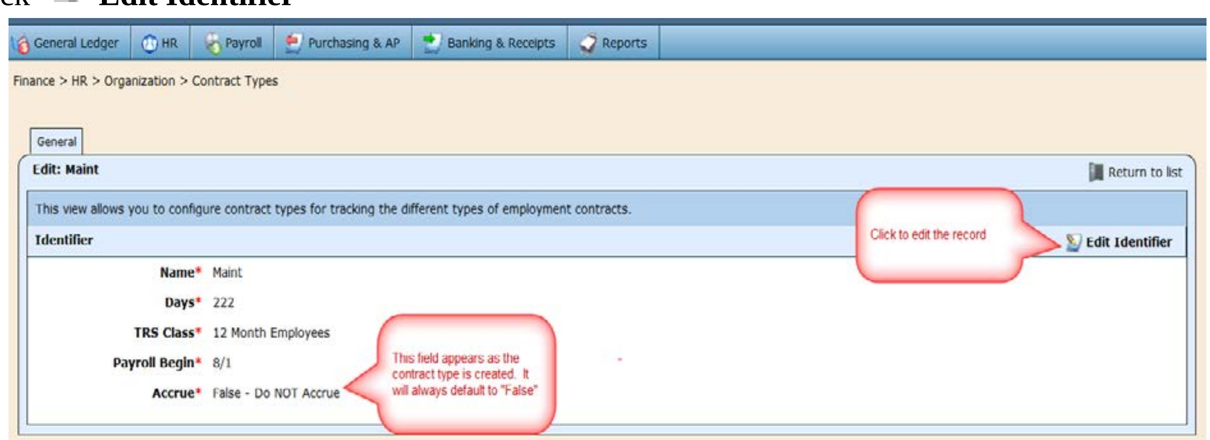


- **Name –** Enter a name for the Contract Type. Example: 10 month, 12 month, Admin.
- **Days –** Enter the number of days of the contract type.
- **TRS Class –** Select the appropriate TRS Class as mandated by TRS from the drop down box.
- **Paychecks – S**elect the number of paychecks for the instructional period.
- **Payroll Begin –** Select the month and the day, from the drop down box, in which the contract should begin during a instructional period. This date is the first date of the first pay period. For example, if the employee is paid monthly, and pay date is September 25th, the Payroll Begin date will be 9/1.

Once the Contract Type is created, it will bring you to a summary screen. Please verify the information you have entered is correct.

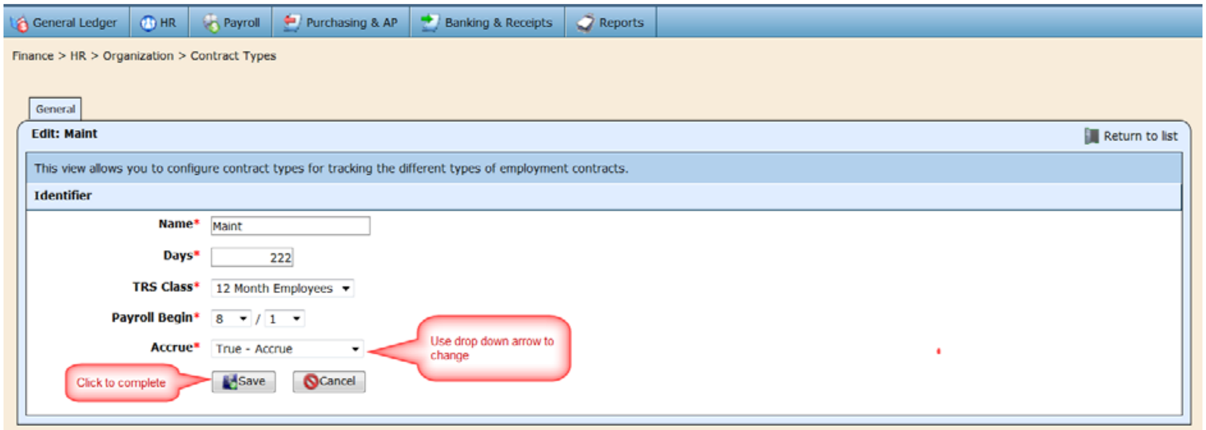
** **Accrue –** This field appears as the contract type is created. It will always default to – FALSE – Do NOT Accrue. If this position should accrue follow the steps shown below:

Click **Edit Identifier**



Make necessary changes.

Click **Save**



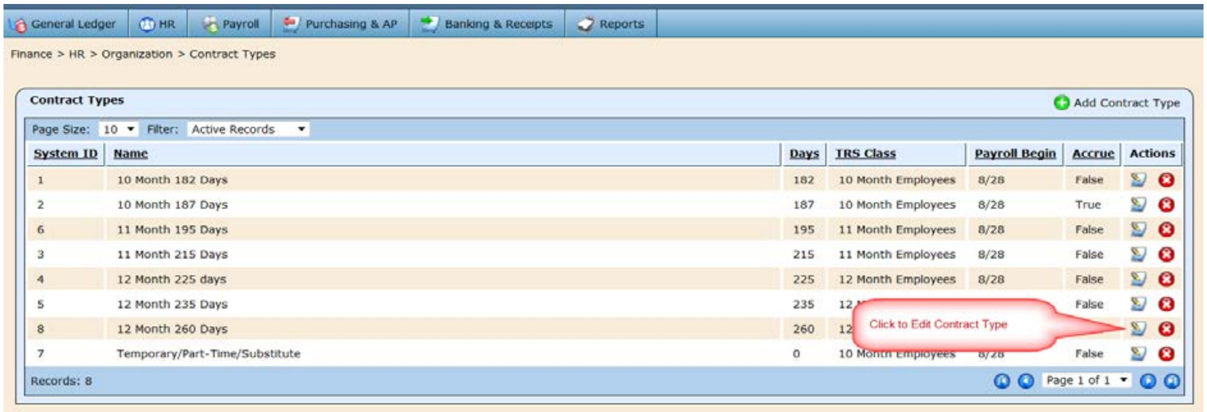
Verify the changes on the Summary Screen.

Edit a Contract Type

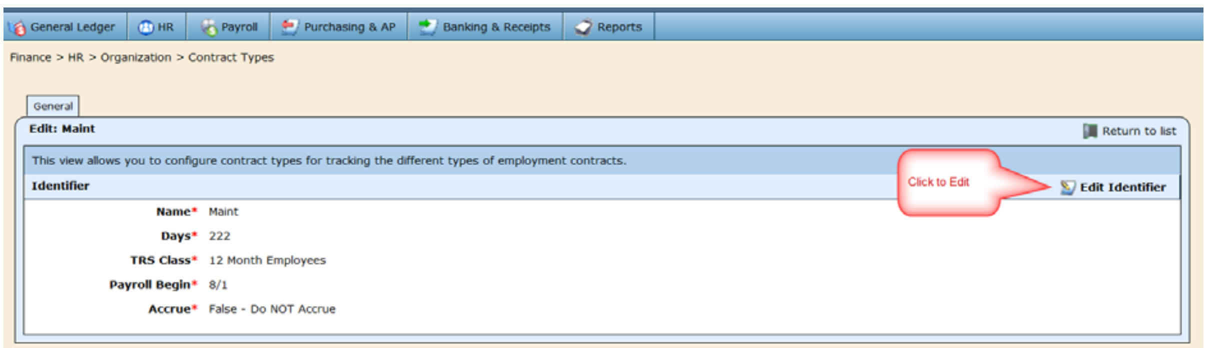
Use caution when editing the Contract Types because it will change information on each employee that is linked to that Contract Type. For example, if you have a contract set up on a 9/1/ payroll begin date, and you edit the payroll begin date to be 8/1/, this changes all employee payment schedules that are on that contract type to be paid from August through July instead of September through August. In which case, each employee's payment schedule on their "Position" would have to be edited also.

***Finance** > HR > Organization > Contract Types*

Click next to the contract type that will be corrected.

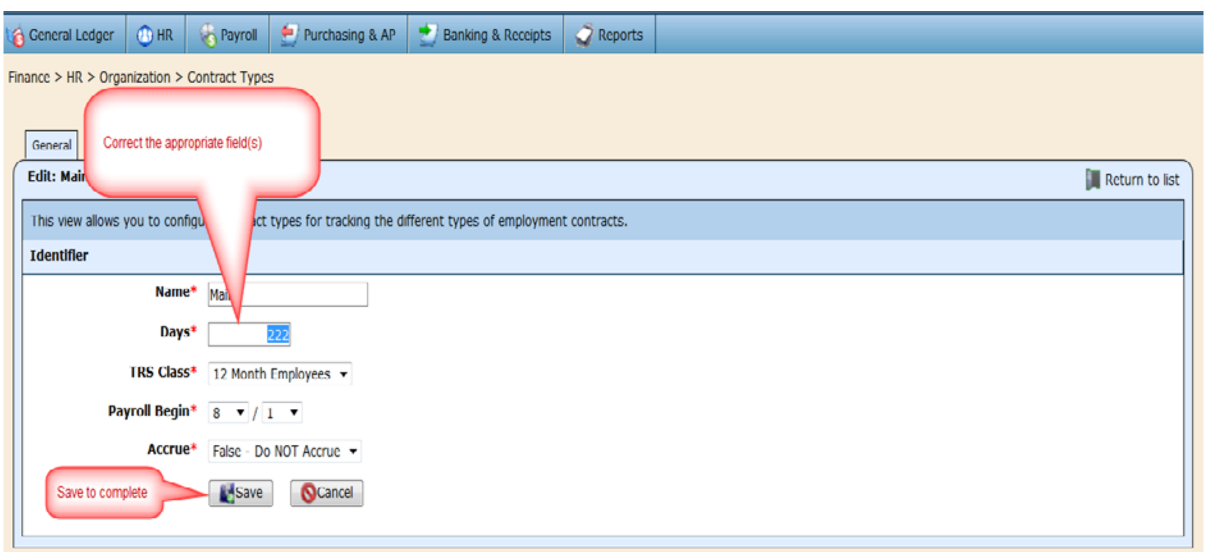


Click **Edit Identifier**

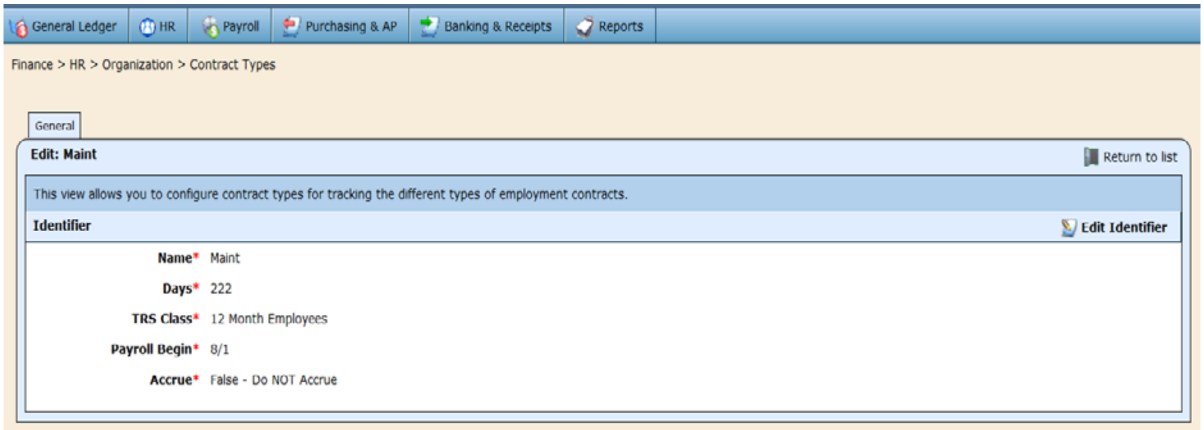


Correct the appropriate fields.

Click **Save**



You will see the summary screen. Verify the information you have entered is correct.

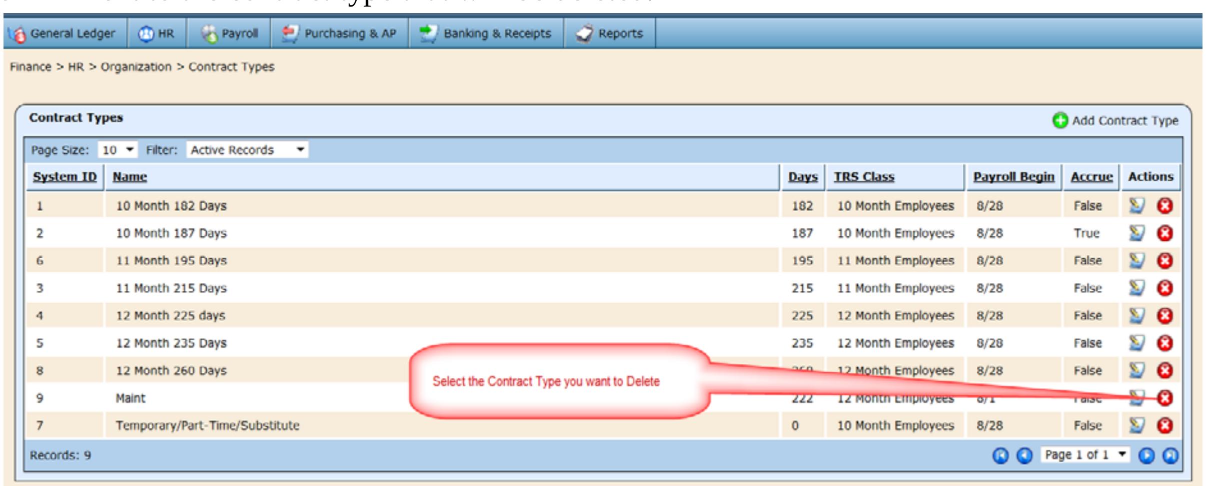


Delete a Contract Type

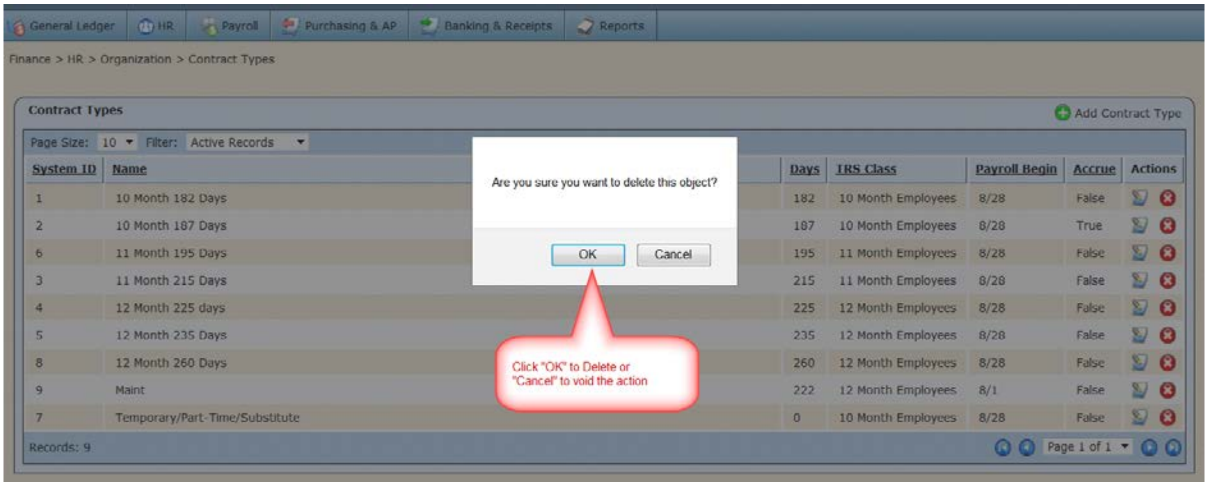
Please ***use caution*** when deleting a Contract Type that has employees attached, as it could generate errors in the Payroll Batch as well as mandatory reports.

Finance > *HR* > *Organization* > *Contract Types*

Click next to the contract type that will be deleted.



Click OK to verify you want to delete the Contract Type.



Restore a Deleted Contract Type

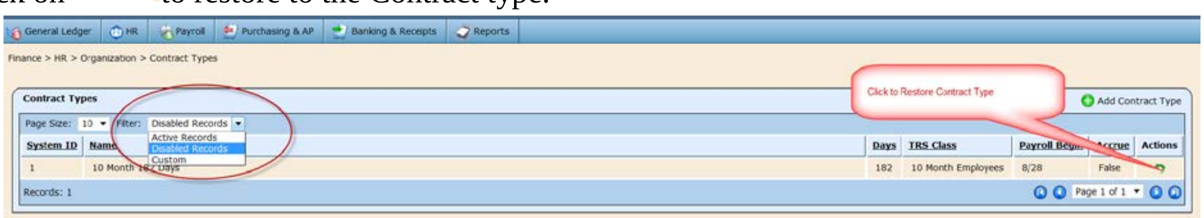
If a contract type has been deleted but has never been used during a payroll process it will be permanently deleted.

If a contract type has been used during one or more payroll processes then the deleted contract type moves from the active records to disabled records. If this contract was deleted in error, use the following steps to restore the contract.

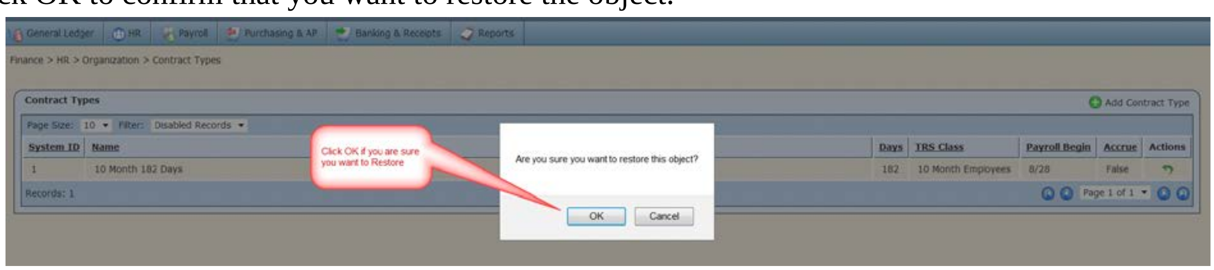
Finance *> HR > Organization > Contract Types*

Use Drop Down Arow to select Disabled Records.

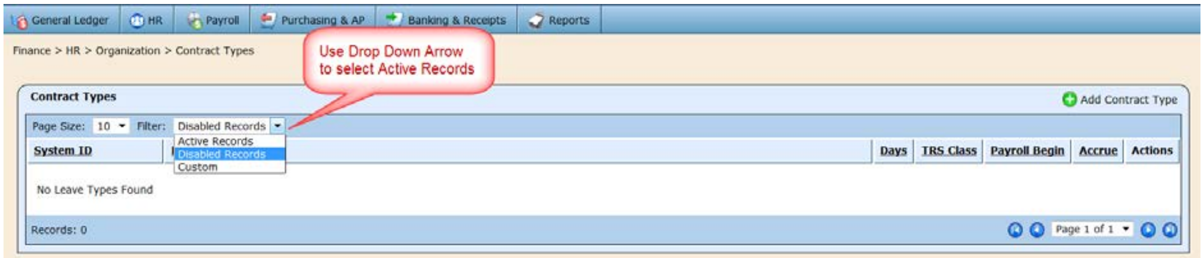
Click on  to restore to the Contract type.



Click OK to confirm that you want to restore the object.



Select Active Records by using the drop down arrow on the Filter.



The record is now shown in the active records.

Promote Contracts

The Promote Contracts utility facilitates the promotion of contracts to the next instructional period. For each qualifying contract in the previous instructional period, a new record will be created given the default dates associated with its contract type while incrementing local experience, years of experience, and pay step. This step also rolls forward employee leave balances and accrues leave as set up according to the leave policy.

- ✓ Replaces Promote Service Records.
- ✓ This utility allows a user to promote multiple Contract Type calendars to the selected instructional period without having to manage each individual type.
- ✓ By selecting the Target Period, the Contract Begin and Contract End dates will populate according to the general ledger dates. This will need to be adjusted according to your calendar for your contract types.

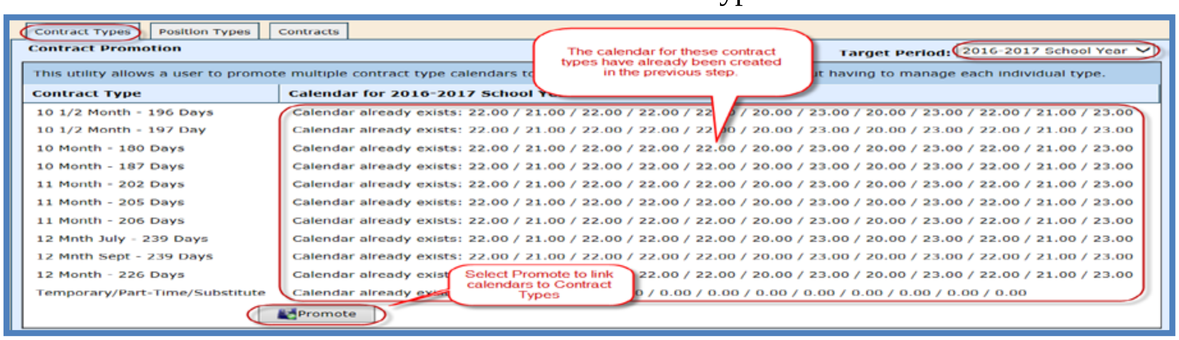
Step 1 - Promote Contract Types

Finance *> HR > Organization > Promote Contract*

Click on the Contract Types Tab.

Select the Target Period from the drop down menu.

Select Promote to Promote to link calendars to Contract Types

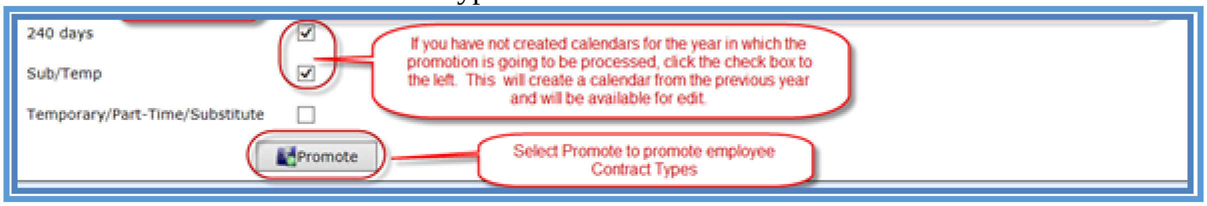


Calendar for 2016-2017 School Year –

- ➢ The calendar for the Contract Types have already been created in the previous step and will pull into this tab.
- ➢ If a calendar has not been set up for a particular Contract Type, once the Promote button is clicked, this process will create a calendar from a previous year. **All calendars will need to be created this year.**

If you see a check box to the right of the Contract Type (under the Calendar for 2016-2017 School Year), that means a calendar has not been associated to that particular contract type. In order to move forward, you need to do one of the following two processes.

- ➢ Check the check box, which will create a calendar from the previous year and will be available for the user to edit. (Suggested)
- ➢ Go back to the Contract Type and add the calendar.



Note: *The user may promote multiple times. The software will only update the Contract Types, which have not been previously updated.*

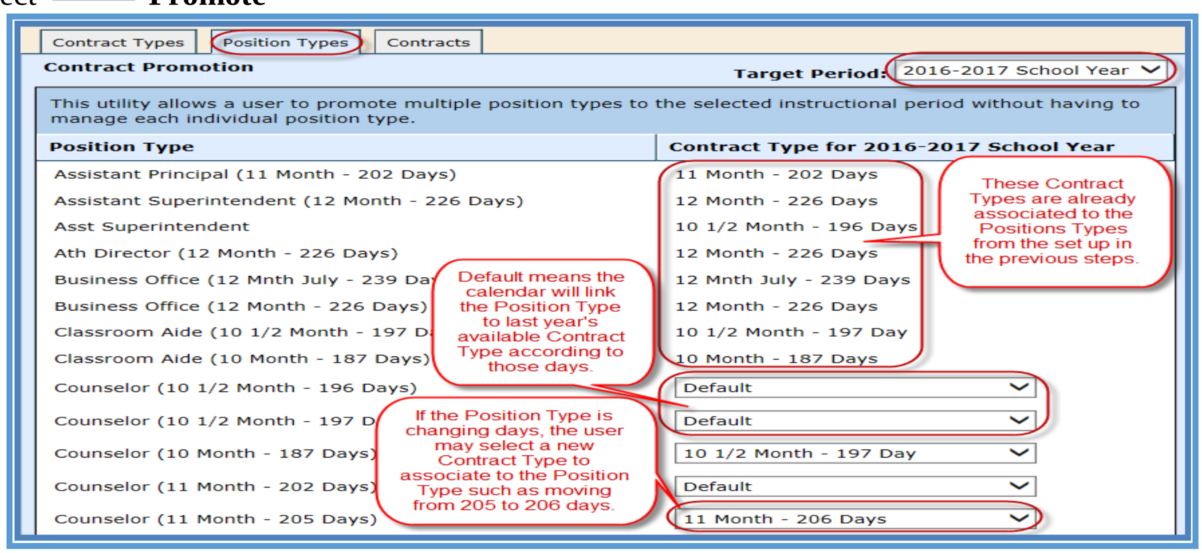
Step 2 - Promote Position Types

This utility allows a user to promote multiple position types to the selected instructional period without having to manage individual position types.

Select the Position Types tab

Select **Target Period** 2016-2017 School Year

Select **Promote**



Note: *The user may promote multiple times. The software will only update the Contract Types, which have not been previously updated.*

Contract Type for 2016-2017 School Year –

- The hours per day for the Position Types have already been created in the previous step and will pull into this tab.
- If the hours per day have not been set up for a particular Position Type, once the Promote button is clicked, this process will create a Contract Type from a previous year.

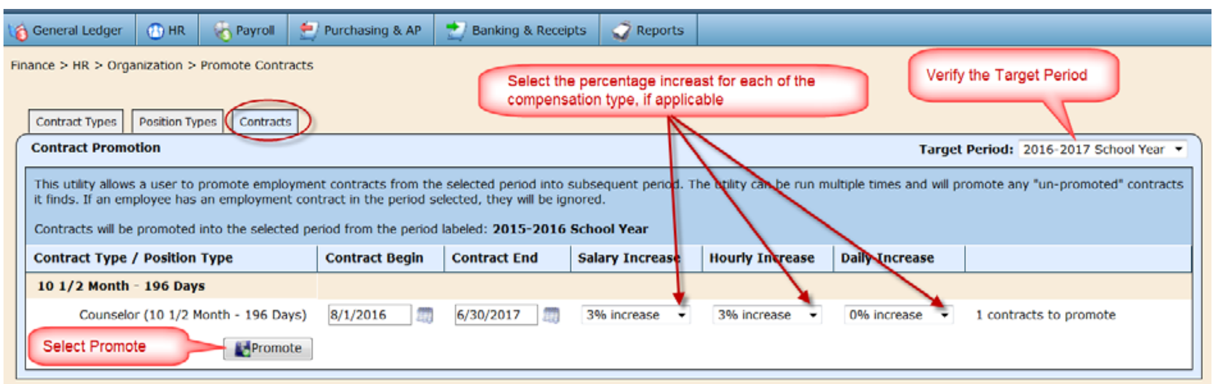
Step 3 - Promote Contracts

This utility allows a user to promote employment contracts from the selected period into a subsequent period. The utility can be run multiple. If an employee has an employment contract in the period selected, it will be ignored.

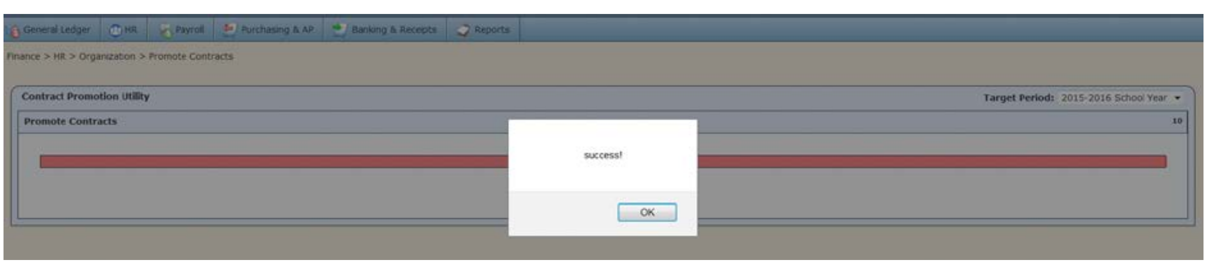
Select the **percentage increase** using the drop down arrows for each compensation type, if applicable.

Select 

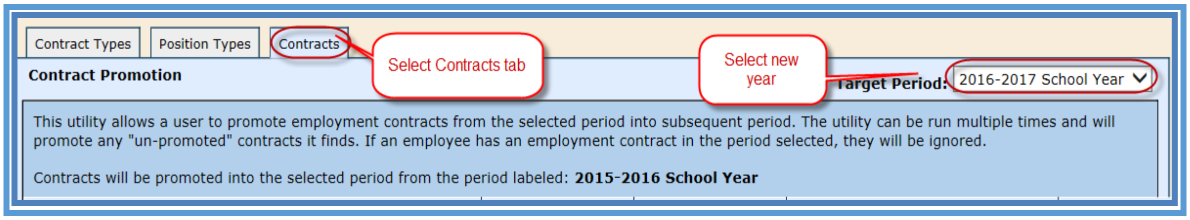
Promote to save these changes and roll forward all active contracts into the instructional period.



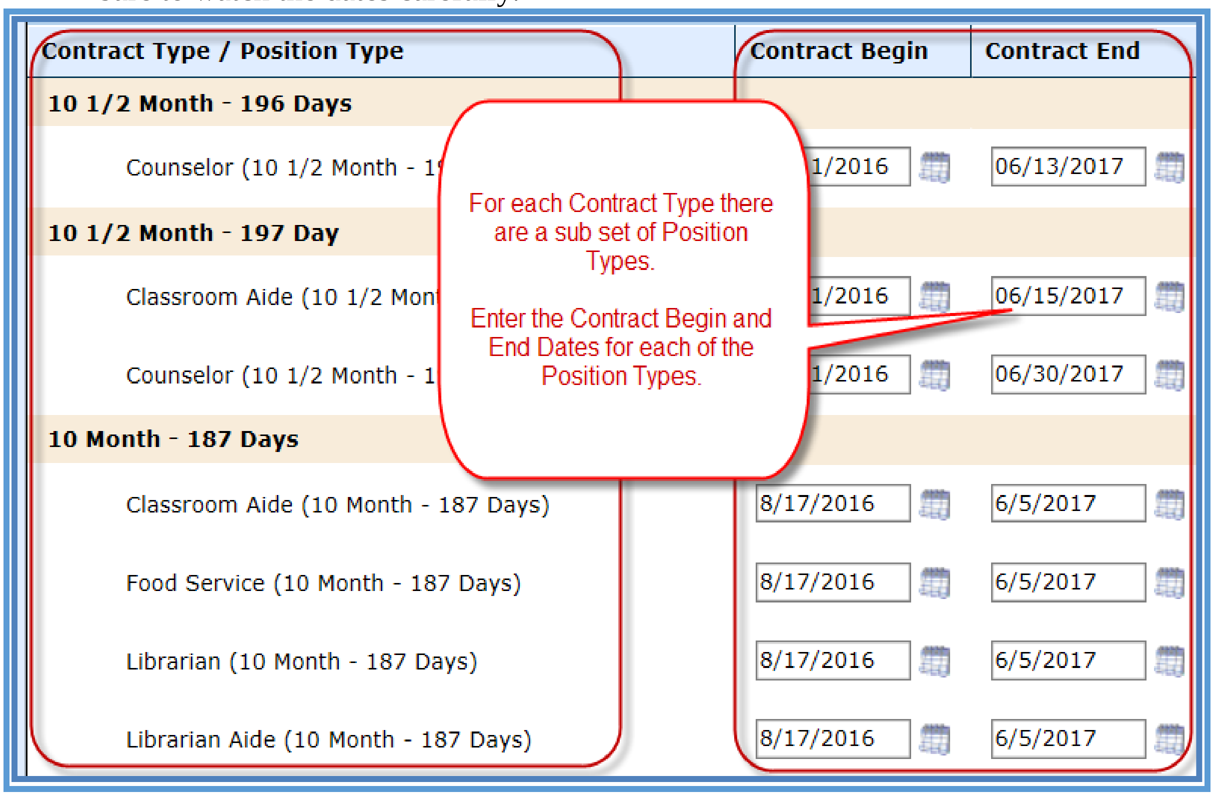
Once the utility is processed, WebSmart will automatically apply the new information and a “Success” window will appear when the process has been completed.



- **Tabs** – select the Contracts tab
- **Target Period** – Select 2016-2017 School Year

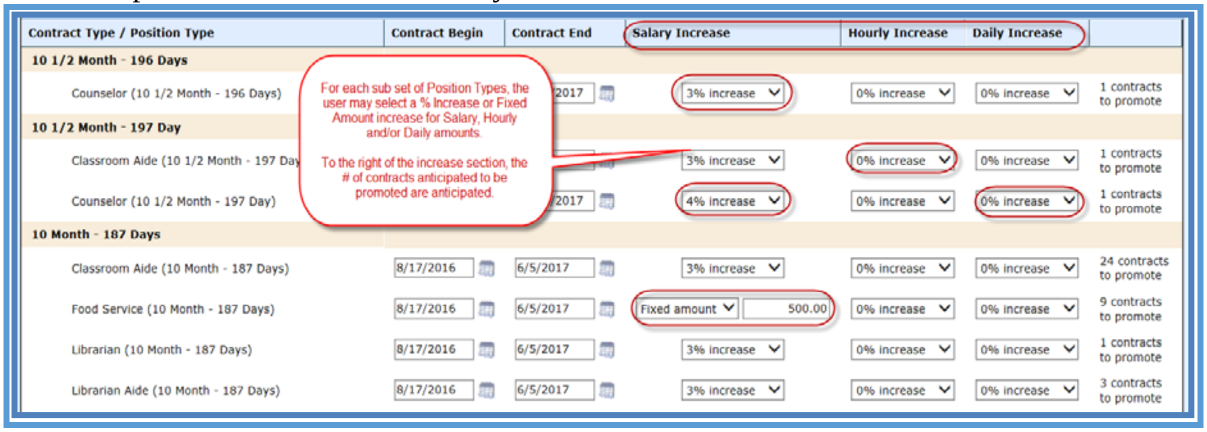


- **Contract Type/Position Type –** The information is listed in categories by Contract Type; each Position Type is shown under the Contract Type
- **Contract Begin –** Enter the Contract Begin dates for each Contract/Position Type
- **Contract End –** Enter the Contract End dates for each Contract/Position Type. Be sure to watch the dates carefully.

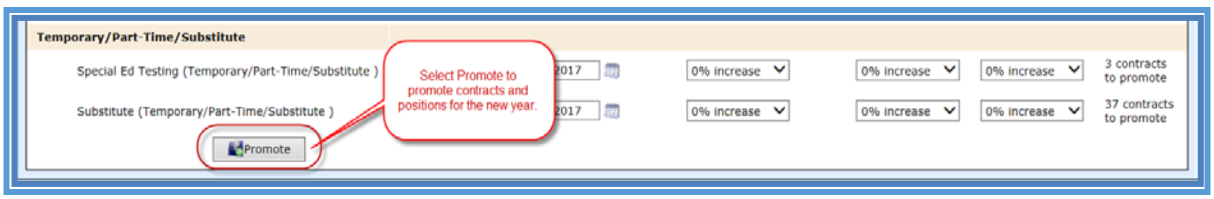


- **Salary Increase –** If the board has approved a salary increase for certain Contract/Position Types, the increase can be selected in this section as a Percentage increase or Fixed Amount and will automatically calculate the payroll increase during the promotion process for all employees attached to this contract type.
- **Hourly Increase –** If the board has approved an hourly increase for certain Contract/Position Types, the Percentage increase or Fixed Amount can be selected in this section and will automatically calculate the payroll increase during the promotion process on the position.
- **Daily Increase –** If the board has approved a daily increase for certain Contract/Position Types, the Percent increase or Fixed Amount can be selected in this section and will automatically calculate the payroll increase during the promotion process on the position.

➢ To the right of the increases, you will see the # of contracts the software is expected to promote for the new school year.



➢ Select **Promote**



Note: *This process rolls leave balances forward.*

Step 4 - Verification of the Promotion Processes

After the contracts have been promoted for next year, be sure to do the following:

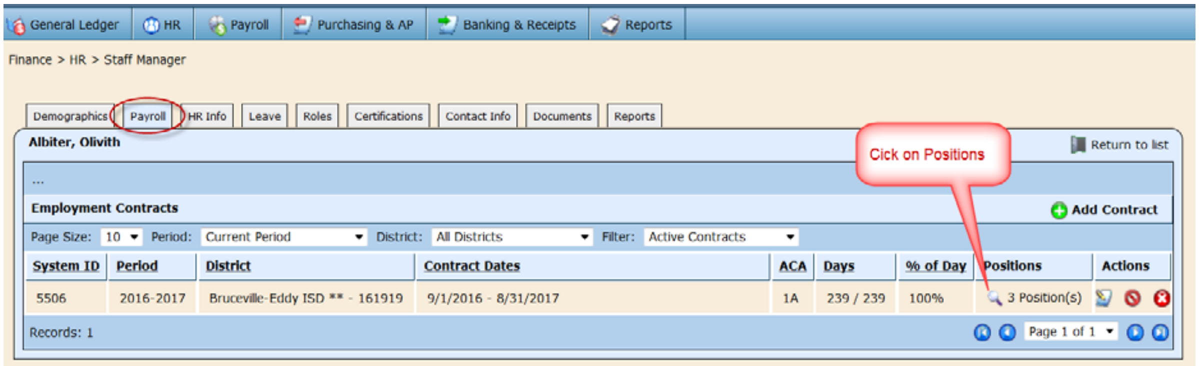
➢ Verify contracts for next year, update if necessary
➢ Verify positions for next year, update if necessary
➢ Run the Employee Wage Report and verify data
➢ Verify updated leave balances
➢ Update individual employee calendars (see more details below)
➢ Update the number of days per week the employee works, if applicable. The default is set to 5 days per week. (see more details below)

Step 5 - Update Individual Employee Calendars

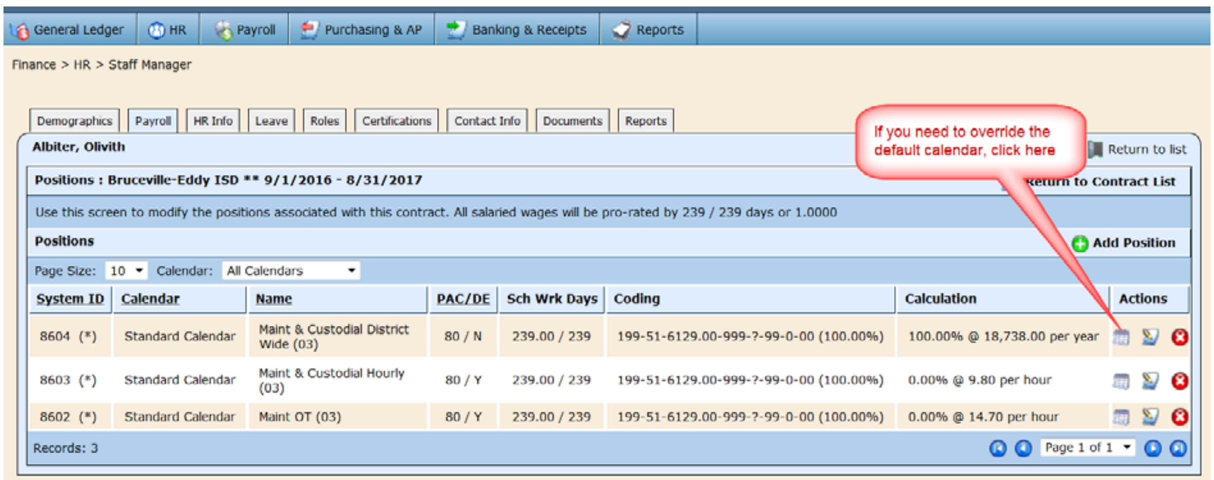
Updating individual employee calendars only applies to an employee that has a different calendar than the calendar that is setup on the contract type.

Go to ***Finance*** > *HR* > *Staff Manager*

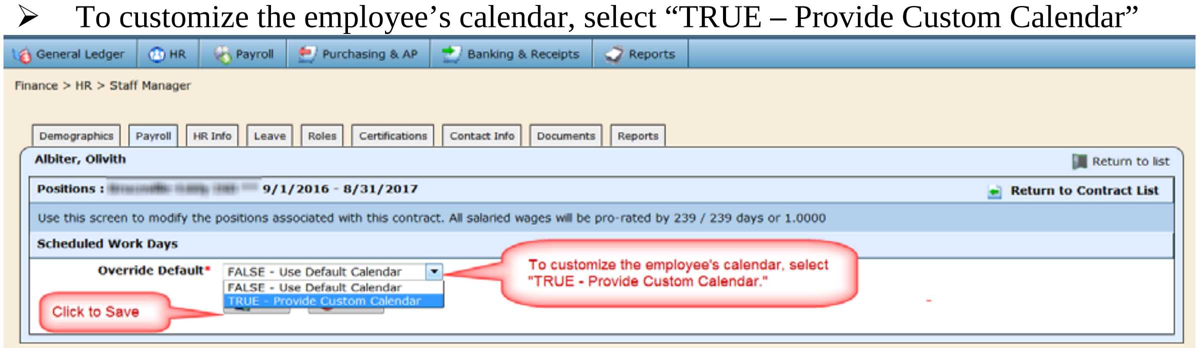
Click Edit the employee
Click on the Payroll tab
Click on the Position



➢ If you need to override the default calendar previously set up on the Contract Types, select the Calendar icon under Actions

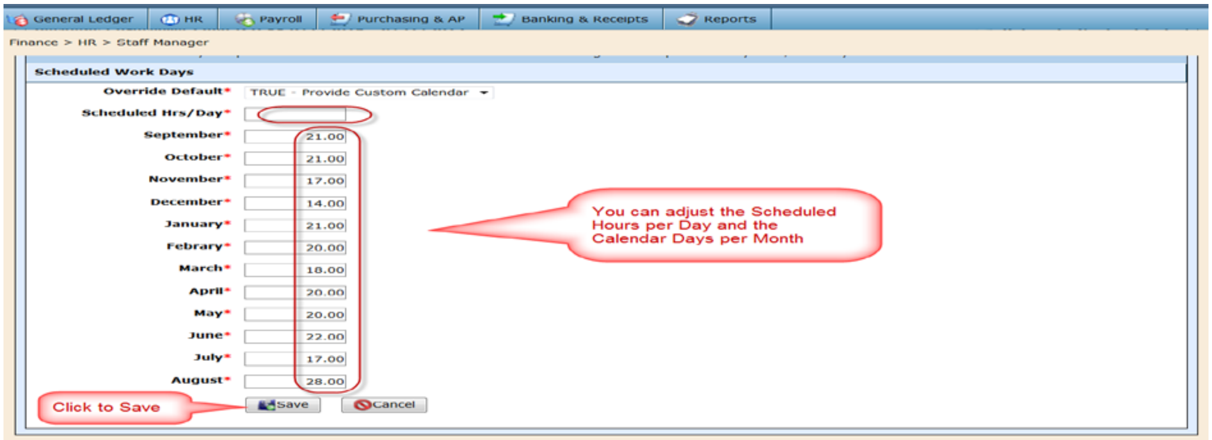


➢ To customize the employee's calendar, select "TRUE – Provide Custom Calendar"

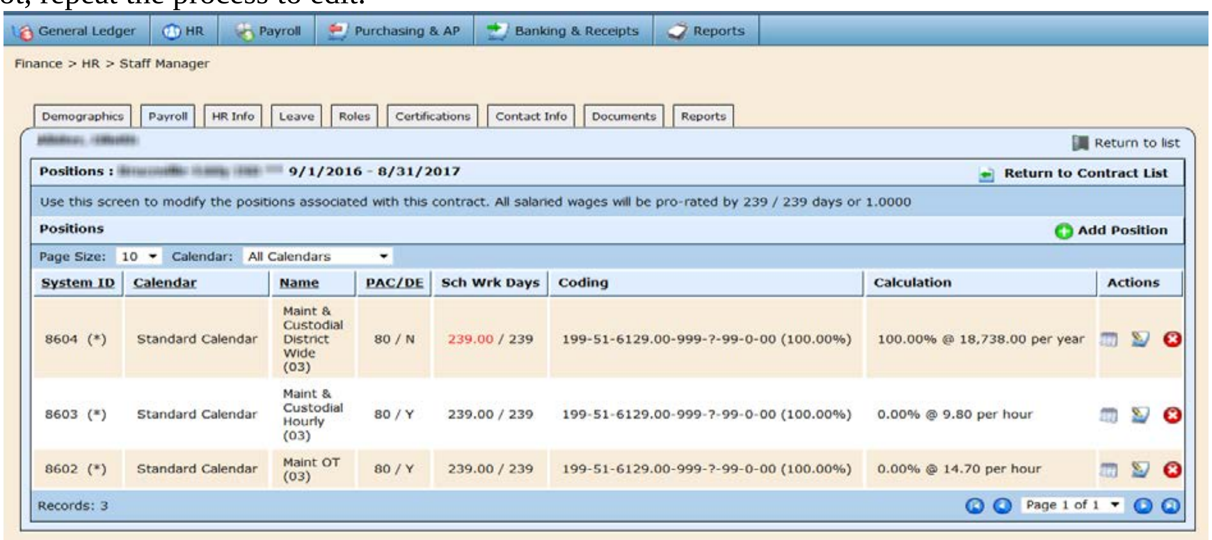


➢ At this point, the user can adjust the Scheduled Hrs/Day and/or the Calendar Days per Month for this individual employee only. These updated days will be reported to TRS.

Select Save.



You will return to the Summary Screen. Verify the information you have entered is correct and if not, repeat the process to edit.

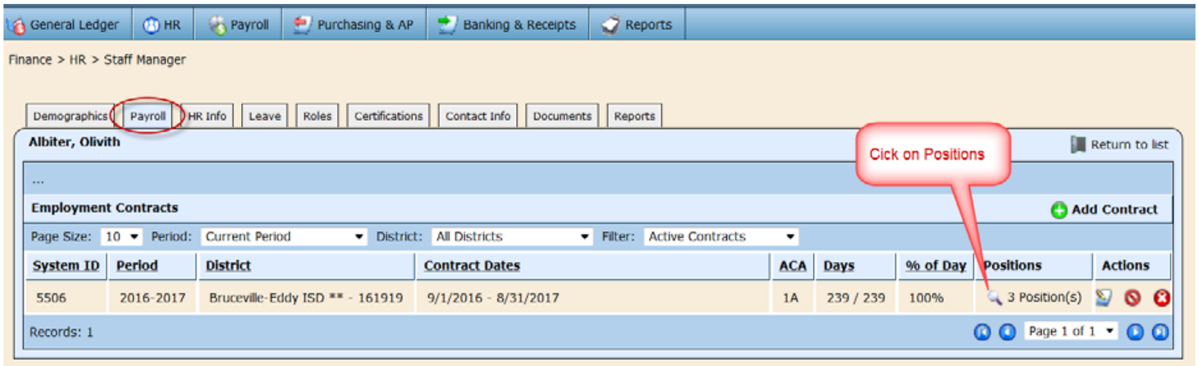


Step 6 - Update the number of days per week the employee works

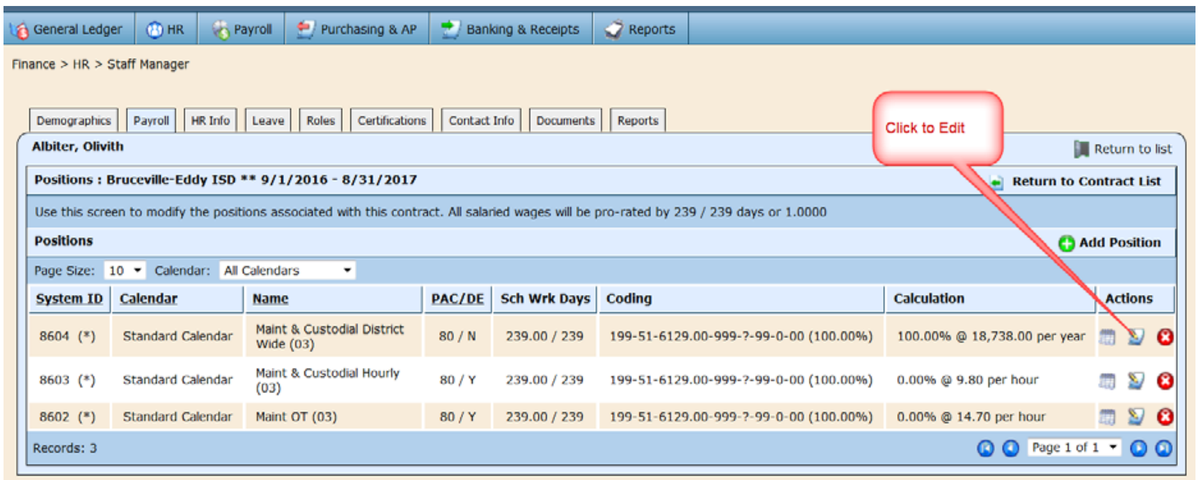
***Finance** > HR > Staff Manager*

Click Edit the employee
Click on the Payroll tab

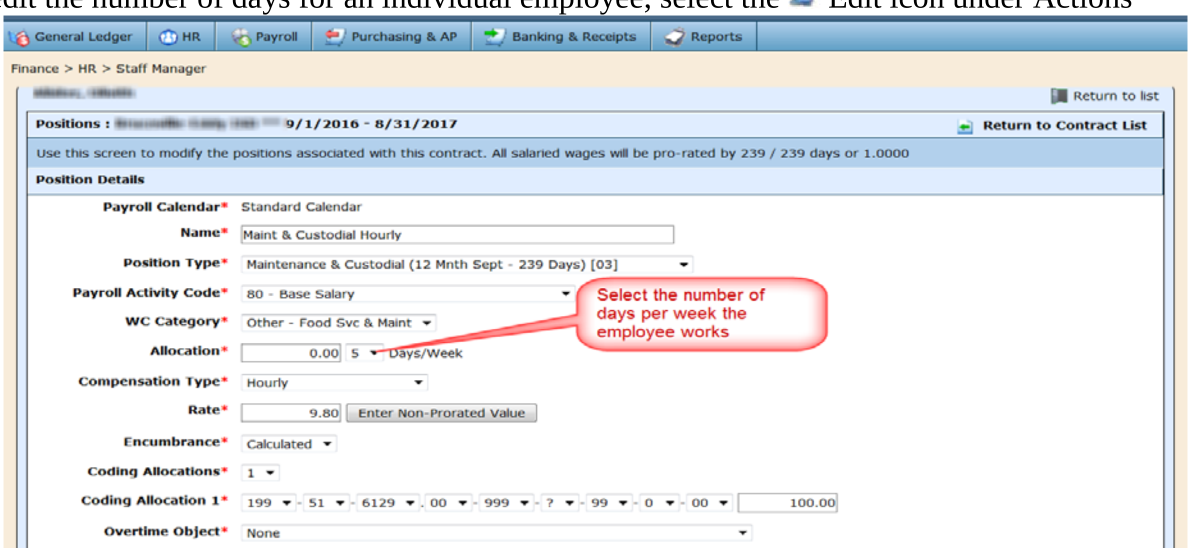
Click on the Position Tab



Click Edit



The number of days per week the employee works defaults to 5 days per week. If the user needs to edit the number of days for an individual employee, select the Edit icon under Actions



Click Save

Chapter 4
Leave

An added feature of WebSmart's HR module is maintaining accurate records of employees' leave balances, types and the policies. This chapter will show you how to set up an employee's information to accurately track leave balances and make changes as necessary.

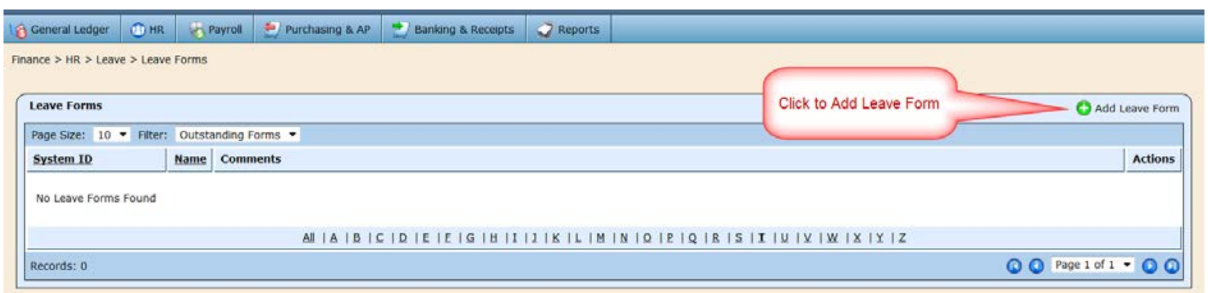
Leave Forms

Leave forms are created to track the number of days an employee is absent. Prior to creating the payroll batch, enter the leave forms. This process will propagate the leave forms into the payroll batch for processing and update the employee's leave on the individual's Leave Detail when the batch is processed.

Adding a Leave Form

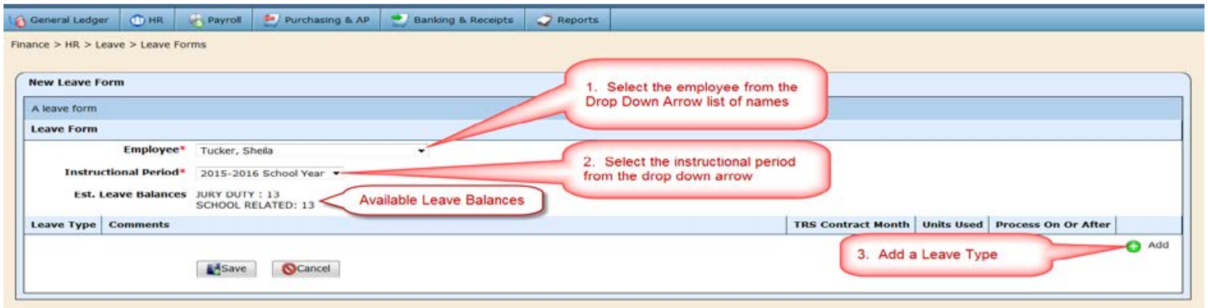
Finance *> HR > Leave > Leave Forms*

Click **Add Leave Form**



Enter the information in each field shown below.

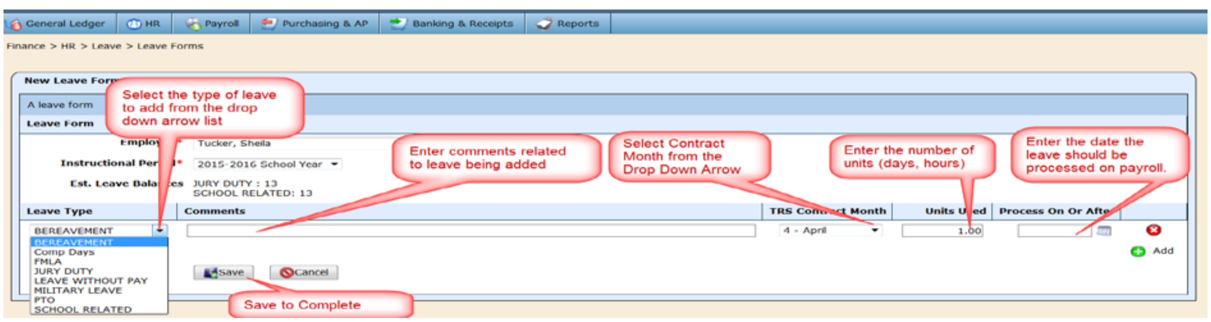
Click on **Add**



- **Employee –** Select employee from the drop down arrow.
- **Instructional Period –** Select the instructional period from the drop down arrow.
- **Comments –** Enter comments relating to leave being added. Can be used to keep track of the actual days of leave.
- **Est Leave Balances –** Once the employee and instructional period are selected this information appears for the employee. These are the available leave balances for each type of leave.

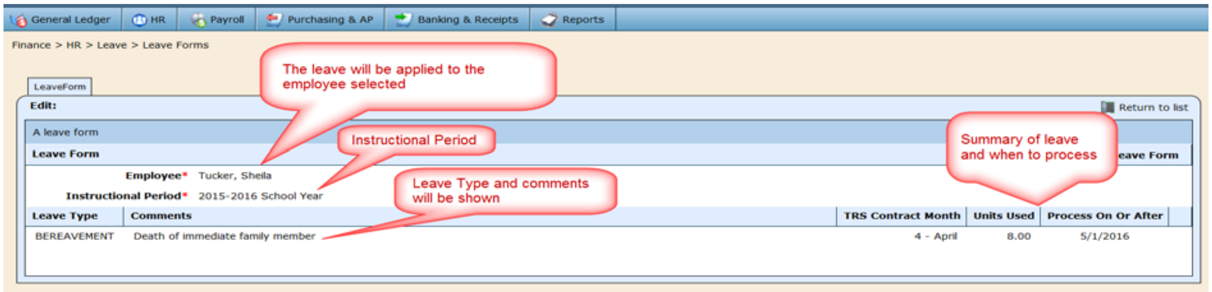
Enter the information in each of the fields shown below.

Click **Save**



- **Leave Type –** Select the type of leave that was used by the employee.
- **Contract Month –** Select the contract month for the leave used. If leave is for a prior month and the employee will be docked, it will update the RP15 for TRAQS reporting.
- **Units Used –** Enter the number of units (days, hours) of leave. If the units entered are more than the balance available, the employee will be docked. (If the leave type was set up to dock.)
- **Process on or after –** Enter the date the leave should be processed on payroll. This gives the ability to enter leave in advance to be deducted on a future pay period.

Summary Screen of Leave Added.



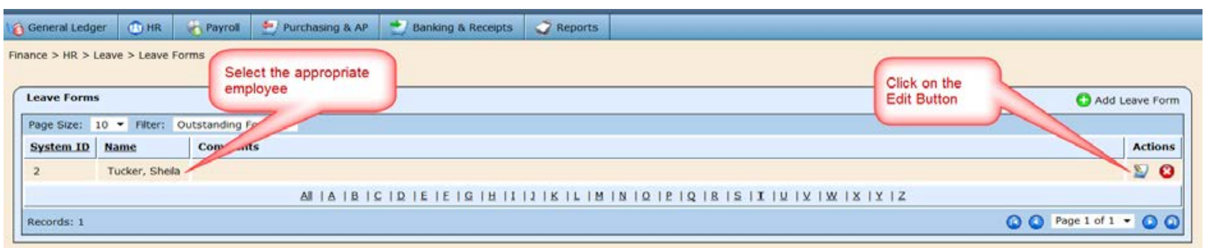
**The leave forms will be pulled into the the appropriate batch based n the date provided in the Process On or After box.

Edit a Leave Form

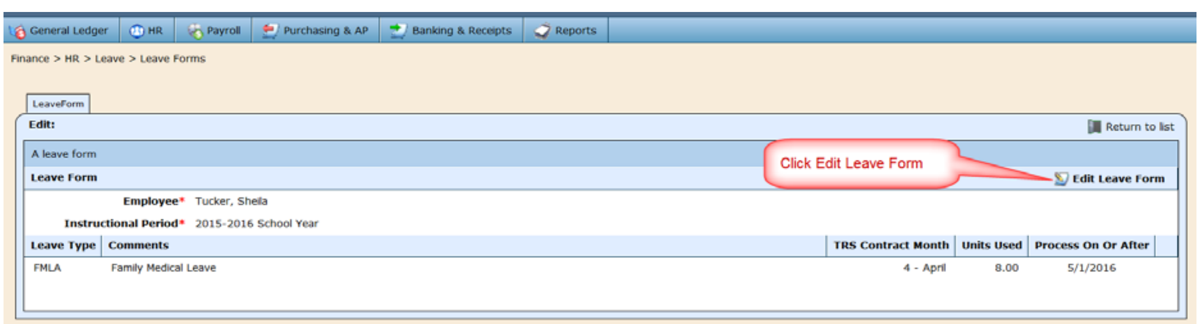
Finance *> HR > Leave > Leave Forms*

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Searching for an Existing Employee."*

Click next to the leave from that will be corrected.

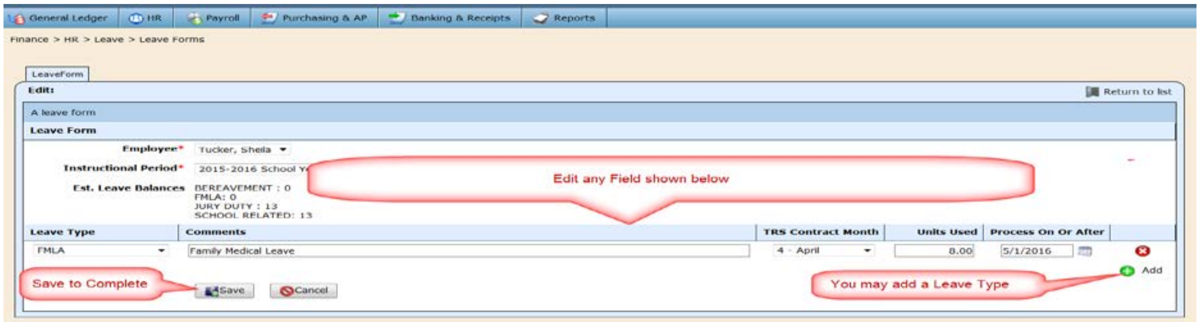


Click **Edit Leave Form**

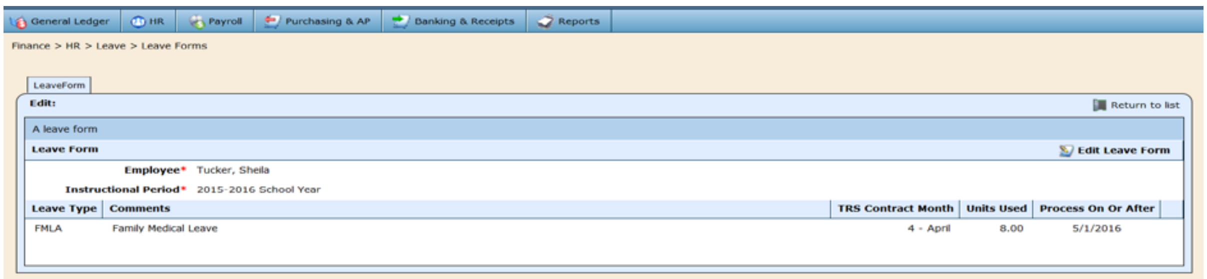


Edit any of the fields at the bottom section.

Click **Save**



From the Summary screen shown below, verify the information is correct. If not, follow the steps above to edit and correct.

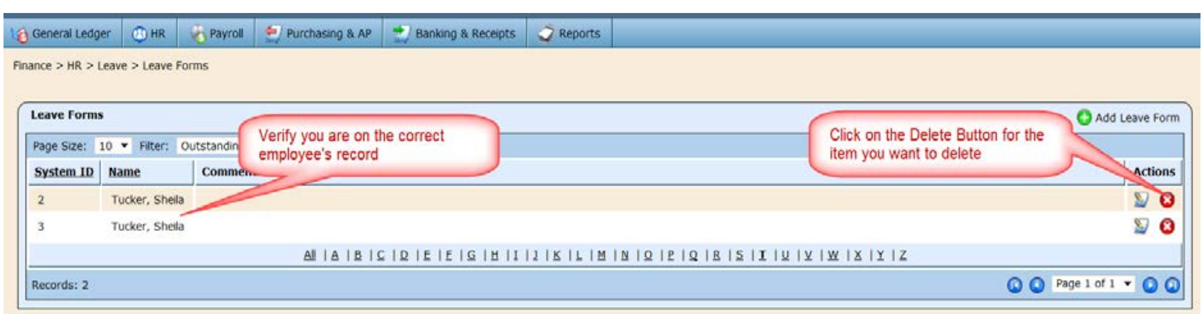


Delete a Leave Form

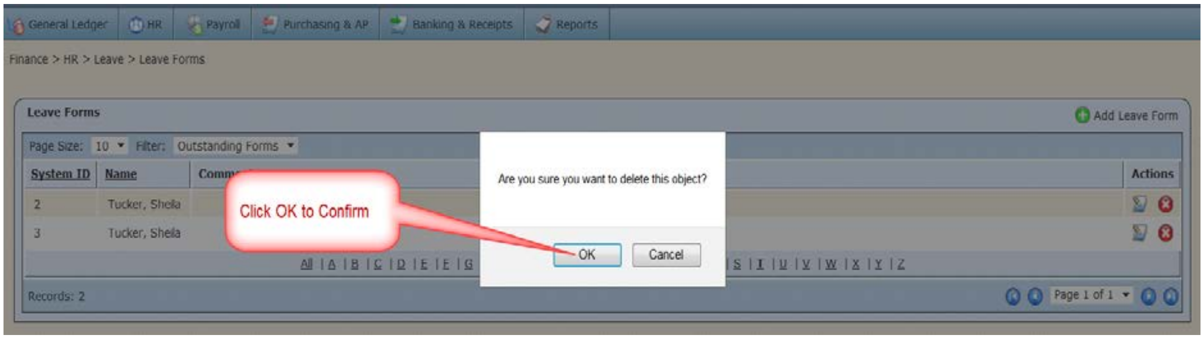
Finance *> HR > Leave > Leave Forms*

***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, "Searching for an Existing Employee."*

Click next to the leave form that will be deleted.



Click **OK** to continue to delete the leave form.



The leave will no longer be shown.

Leave Types

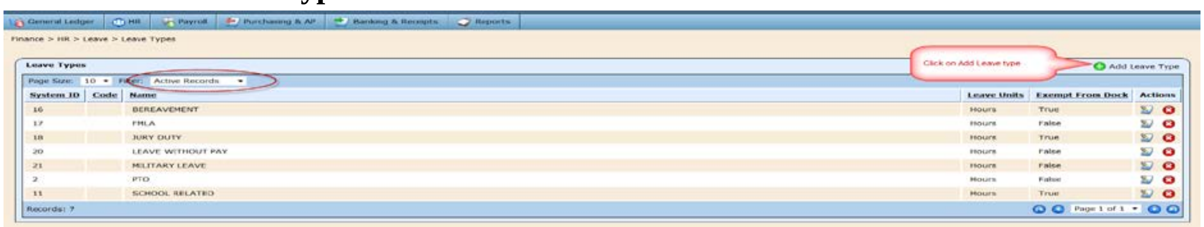
Leave Types are created to serve the following functions:

- to categorize employee leave by type when leave forms are created
- to track and maintain the balance of state days, which should print on the employee service record

Adding a Leave Type

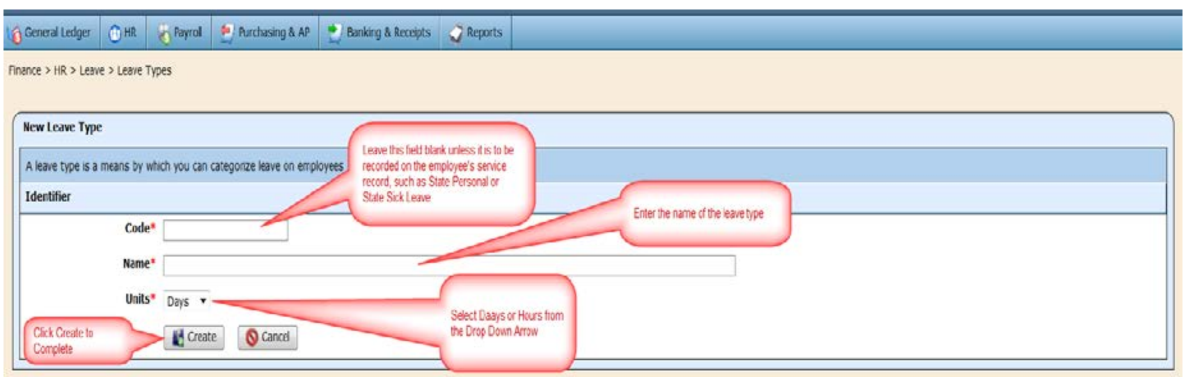
Finance *> HR > Leave > Leave Types*

Click on **Add Leave Type**



Enter the information for type of Leave you want to add.

Click on **Create**



- **Code** - Leave this field blank unless it is to be recorded on the employee service record, such as State Personal or State Sick leave as follows:

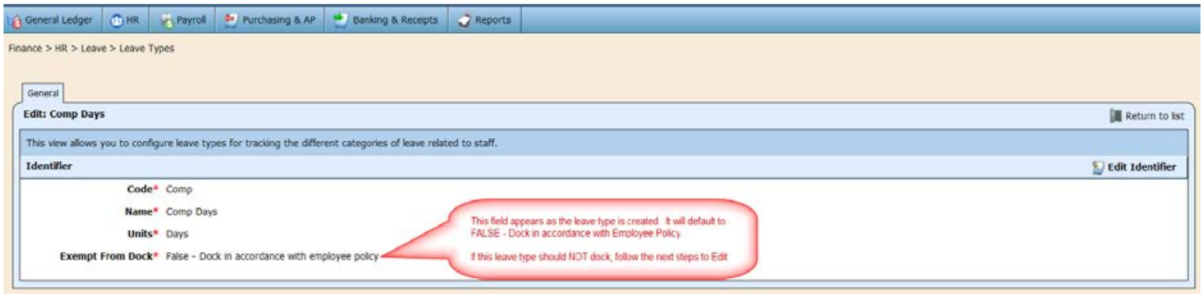
  a - State Sick

  b - State Personal

All others are not to be recorded on the employee service record

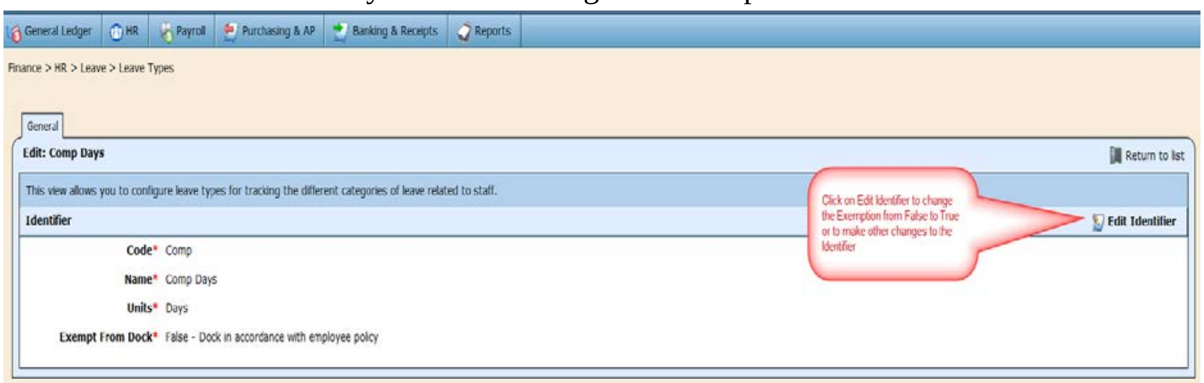
- **Name** – Enter the name of the leave type.
- **Units** - Select Days or Hours in the drop down box.

You will see a summary screen. Verify that what you have entered is correct. If not, follow the instructions under "Edit Identifier" to correct.



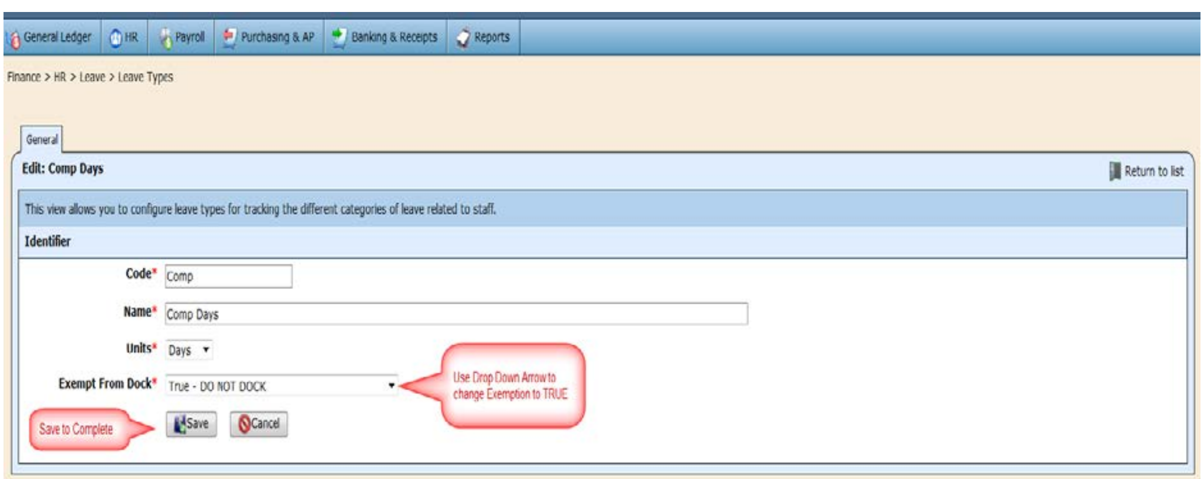
Exempt from Dock – This field appears as the leave type is created. It will always default to False – Dock in accordance with employee policy. If this should leave type should NOT dock, follow the next steps.

Click on **Edit Identifier** if you need to change the Exemption.

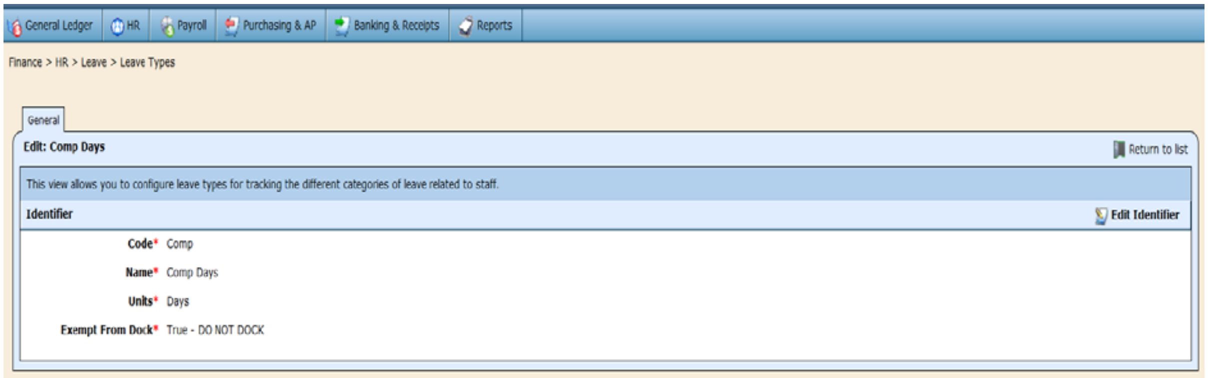


- **Exempt from Dock –** Use drop down arrow to select if the leave type should NOT be docked.

Click on **Save**



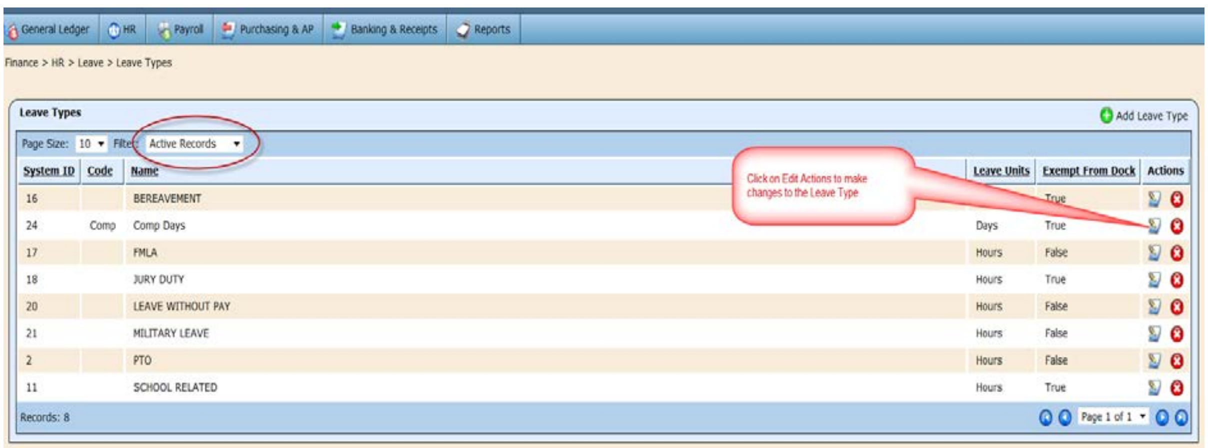
Verify the Exemption has changed to True.



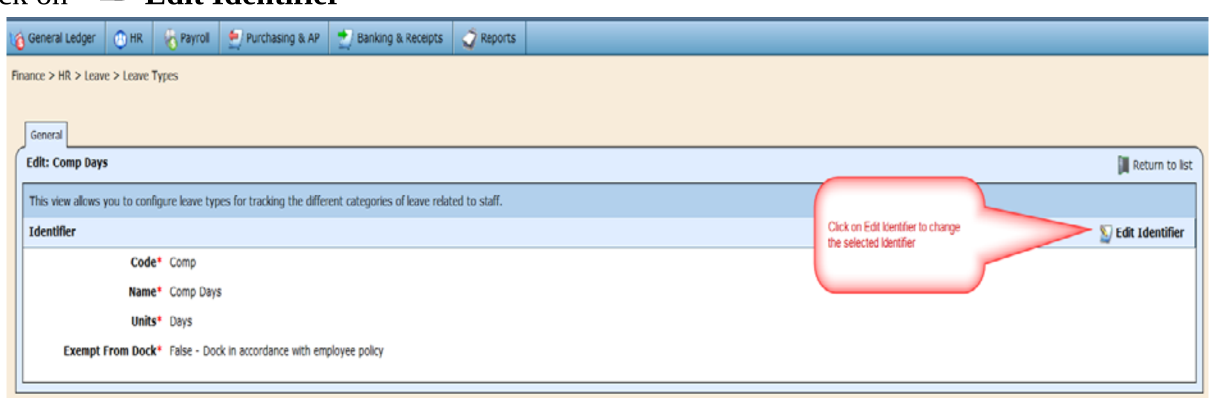
Edit a Leave Type

Finance *> HR > Leave > Leave Type*

Click  next to the contract type that will be corrected.

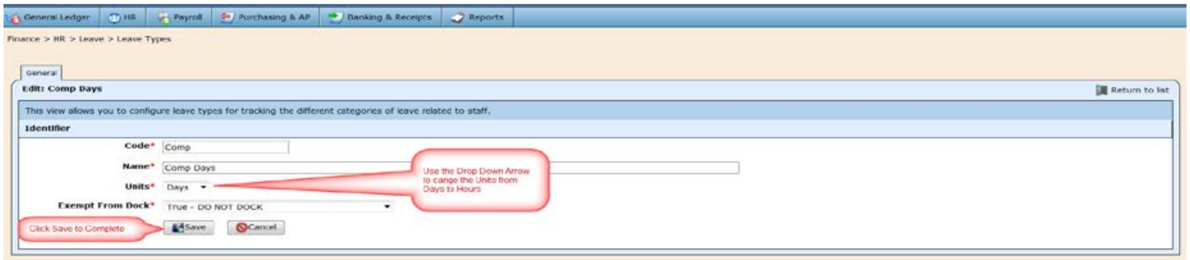


Click on  **Edit Identifier**

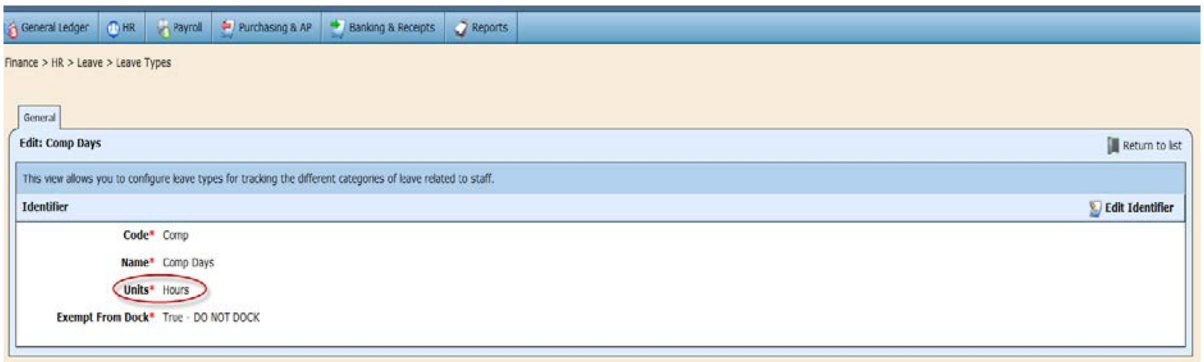


Correct the appropriate fields, such as Hours or Days.

Click **Save**



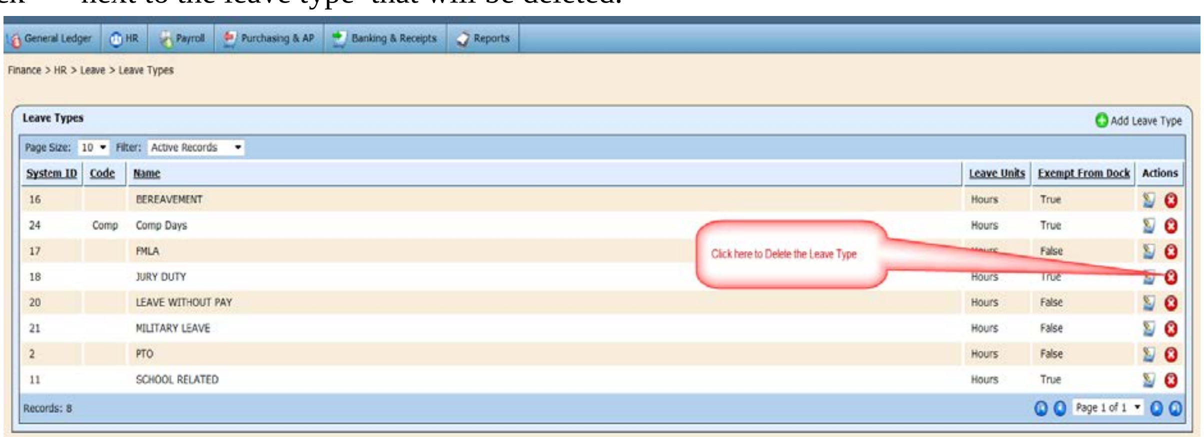
The changes will show on the summary screen below.



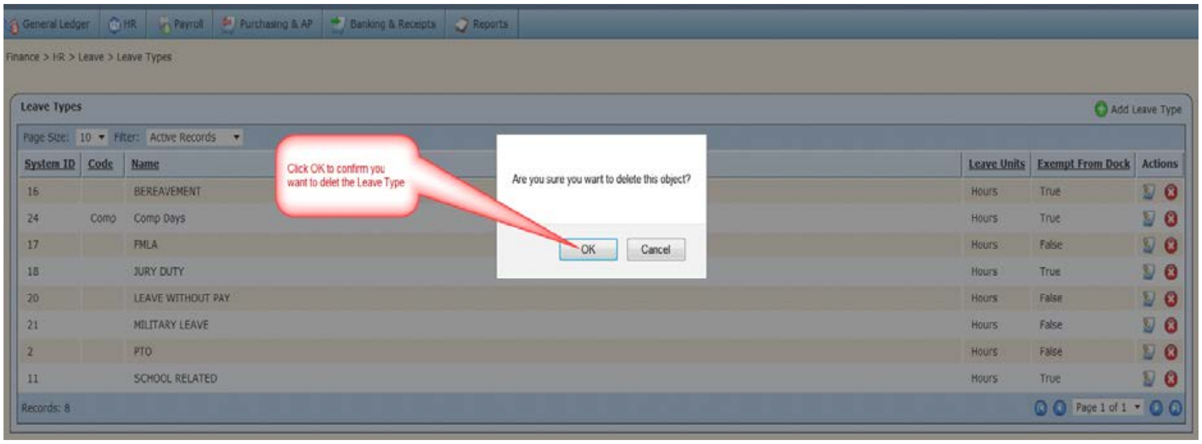
Delete a Leave Type

Finance *> HR > Leave > Leave Types*

Click next to the leave type that will be deleted.



Click **OK** to continue to confirm you want to delete the leave type.



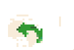
Restore a Leave Type

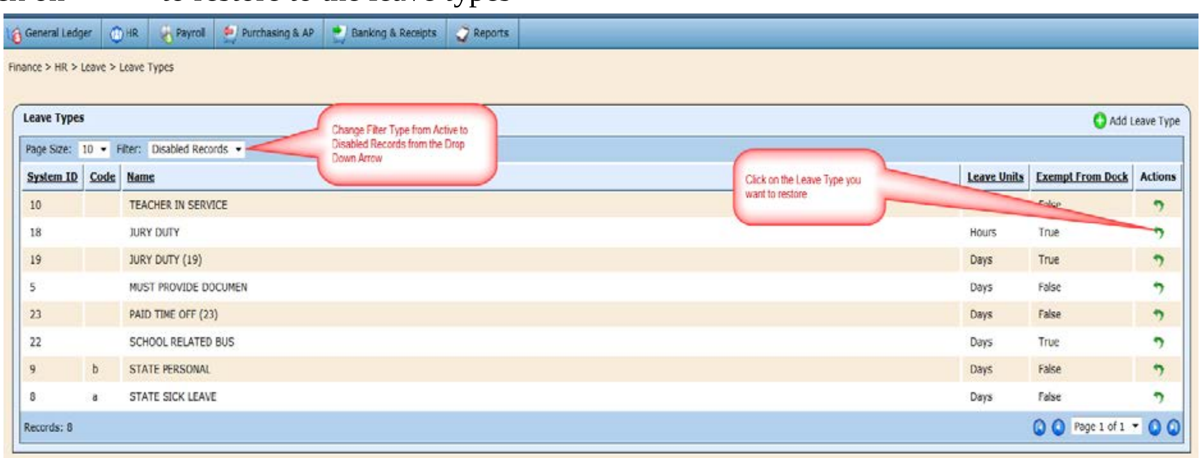
If a leave type has been deleted, but has *never been used during a payroll process* it will be permanently deleted.

If a leave type has been used during one or more payroll processes, then the deleted leave type will move from the <u>active</u> records to <u>disabled</u> records. If this leave type was deleted in error, follow the following steps to restore the leave.

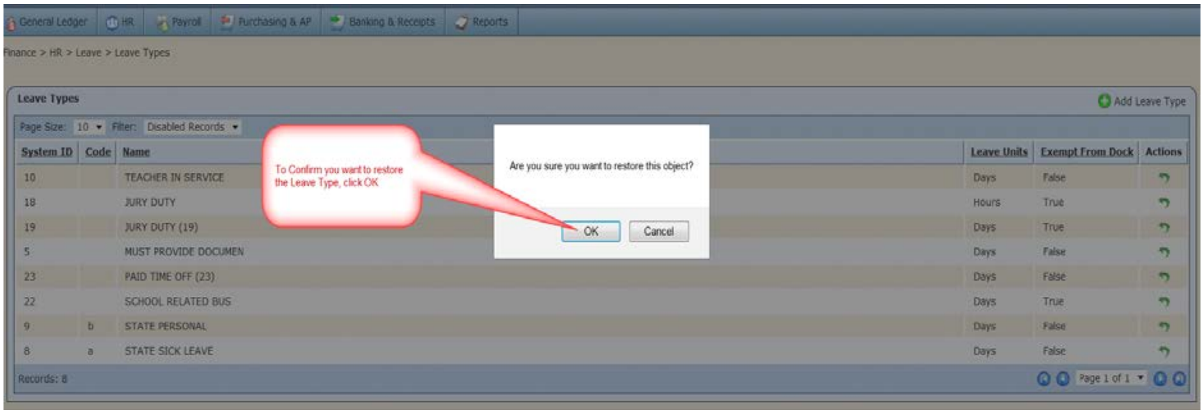
Finance > HR > Leave > Leave Types

Change the filter from “Active Records” to “Disabled Records” using the Drop Down Arrow.

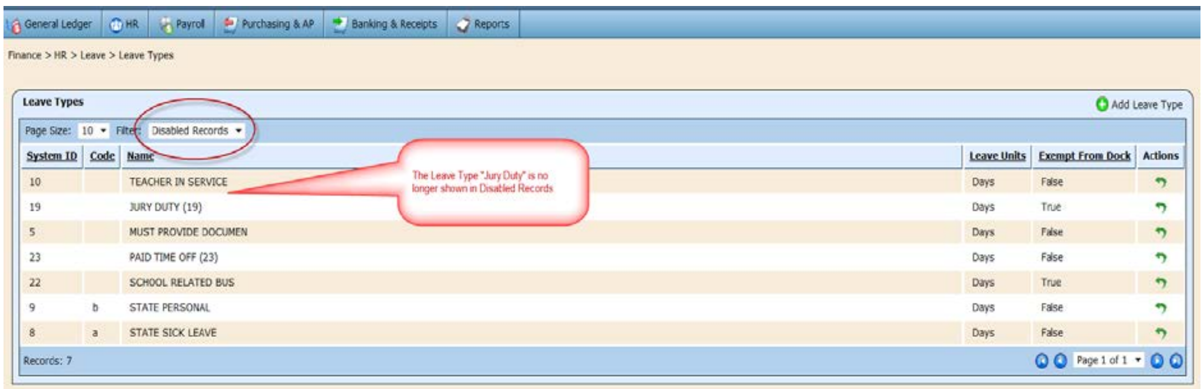
Click on  to restore to the leave types



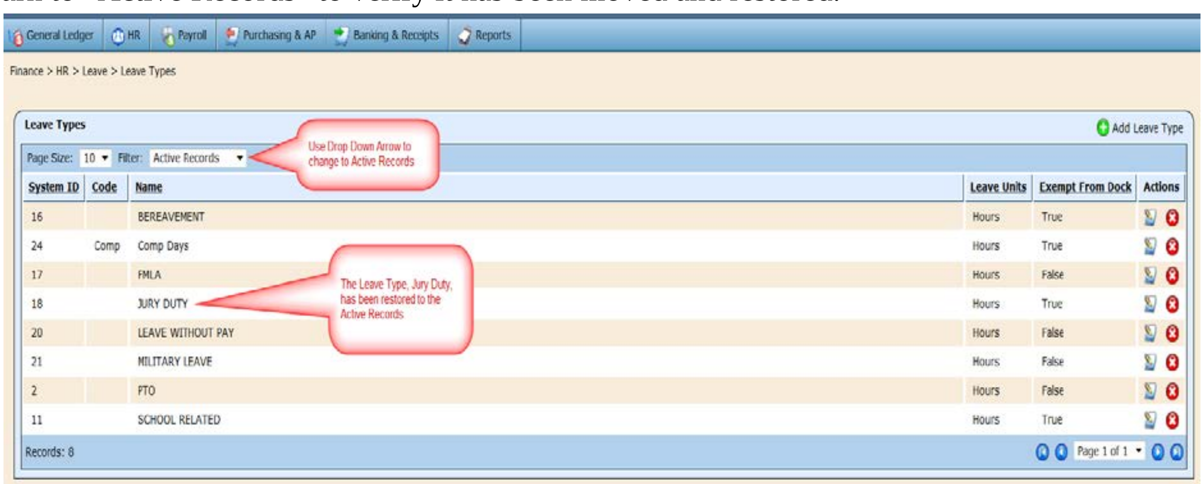
Click **OK** to continue to restore the leave type.



The screen below confirms the record has been moved from "Disabled Records".



Return to "Active Records" to verify it has been moved and restored.



Leave Policies

Leave Policies are designed according to each district's local policy. Leave Policy Examples:

- Standard Leave Group
- Maintenance/Custodial
- Non-Eligible Employees

Leave Policies are assigned to an employee in ***Finance*** > *HR* > *Staff Manager* > *Leave Policy Elections* when initially entered into HR.

Leave Policies are designed to have multiple functions in the payroll process:

- Accrual: Leave Polices are created to accrue specified Leave Types to a group of employees for a particular time period, such as by pay period or annually. Again, this is initially set up according to your local leave policy.
  - *For example, this process simplifies accruing the state personal days and/or local days at the beginning of each instructional period.*

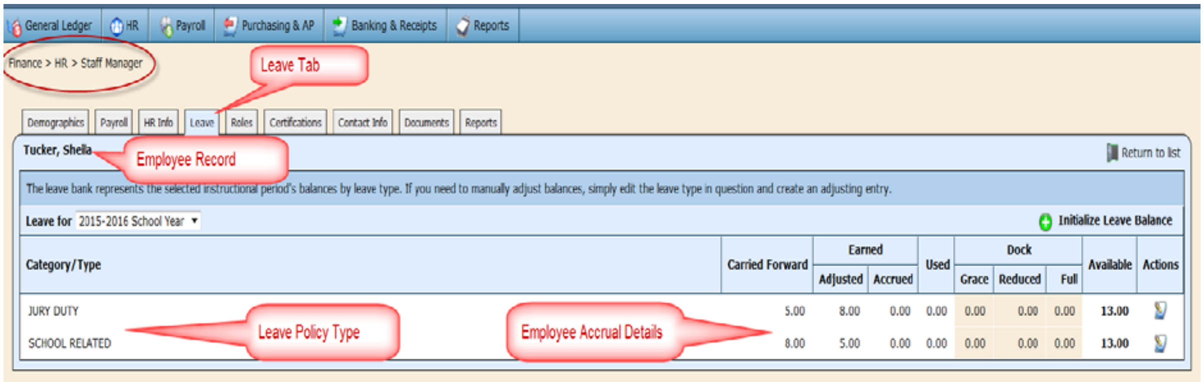
- Dock: Leave Policies also contain the option to dock employee leave given entered criteria for Days of Grace, Days of Reduced Dock, Reduced Dock Method and the Reduced Dock Rate.
  - *For example, if an employee is absent due to FMLA reasons and district policy indicates that the employee shall be docked at a lower daily rate instead of at his/her daily rate of pay, the information would be entered here.*

Helpful Hints

- ✓ Leave Policies are attached to Leave Types that are attached to individual employee's information.
- ✓ Leave Policies also have Types within the policy. Do not confuse these Leave Policy Types with Leave Types.
- ✓ The Policies are specific to each District's local policies such as accruals and/or Docking Rates for various types of leaves.

Leave Policies are assigned to each employee's Leave Types when they are set up in the HR Staff Module.

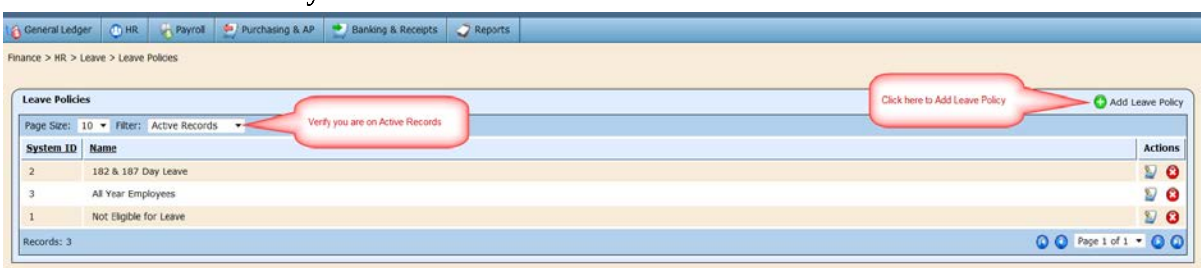
Example: ***Finance*** > *HR* > *Staff Manager*; then select an Employee's record and go to the Leave Tab. That is where you will find each employee's Leave Balances and how the accruals are calculated.



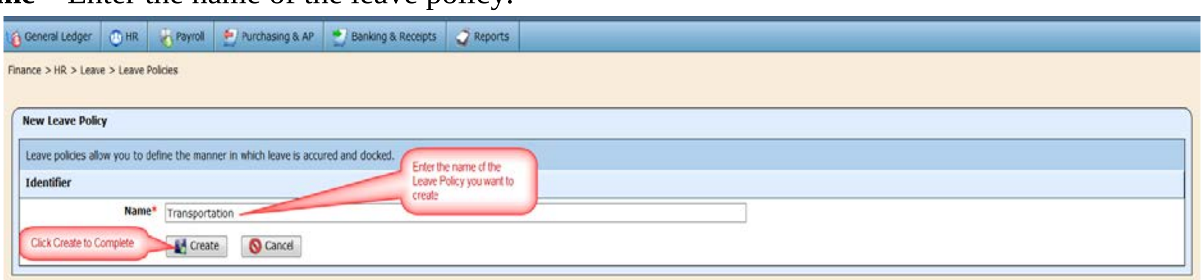
Adding a Leave Policy

Finance *> HR > Leave > Leave Policies*

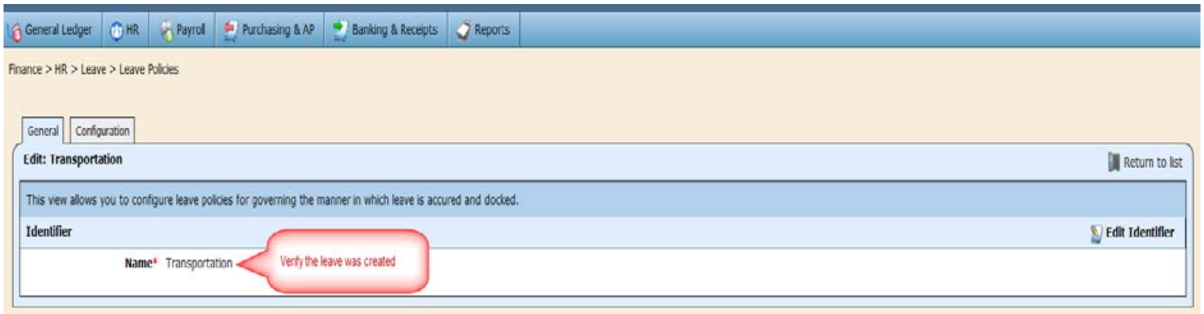
Click **Add Leave Policy**



Name – Enter the name of the leave policy.

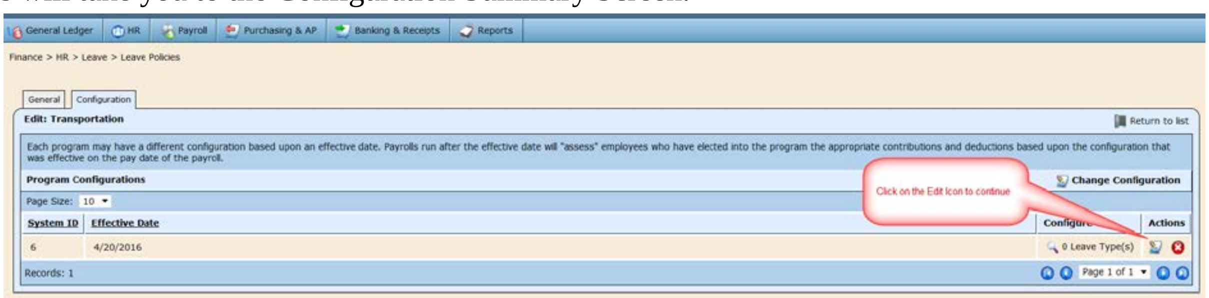


Click **Create**

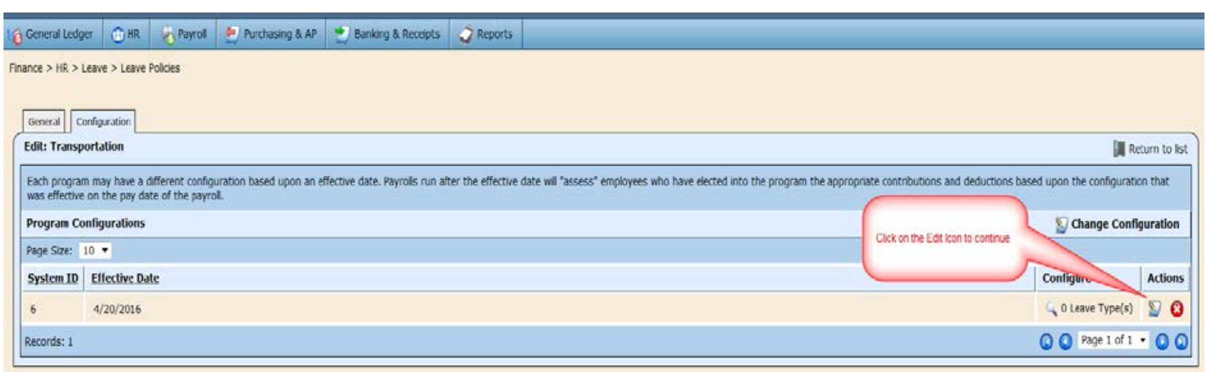


Click the Configuration tab.

This will take you to the Configuration Summary Screen.

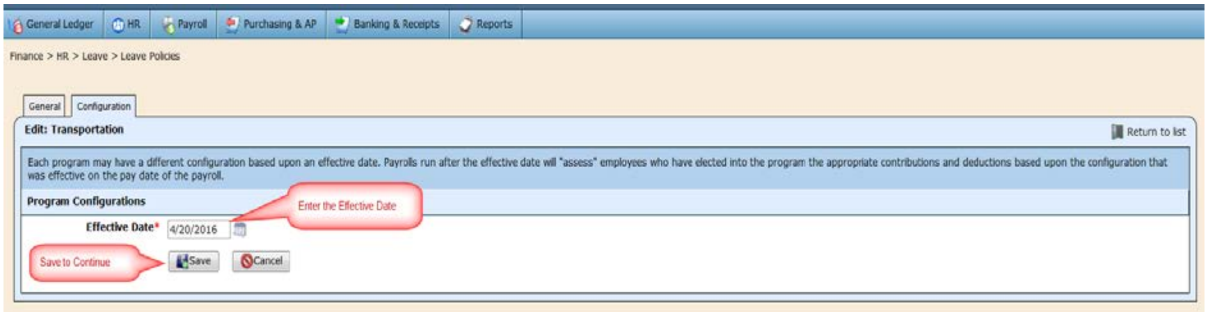


Click on **Edit Identifier**

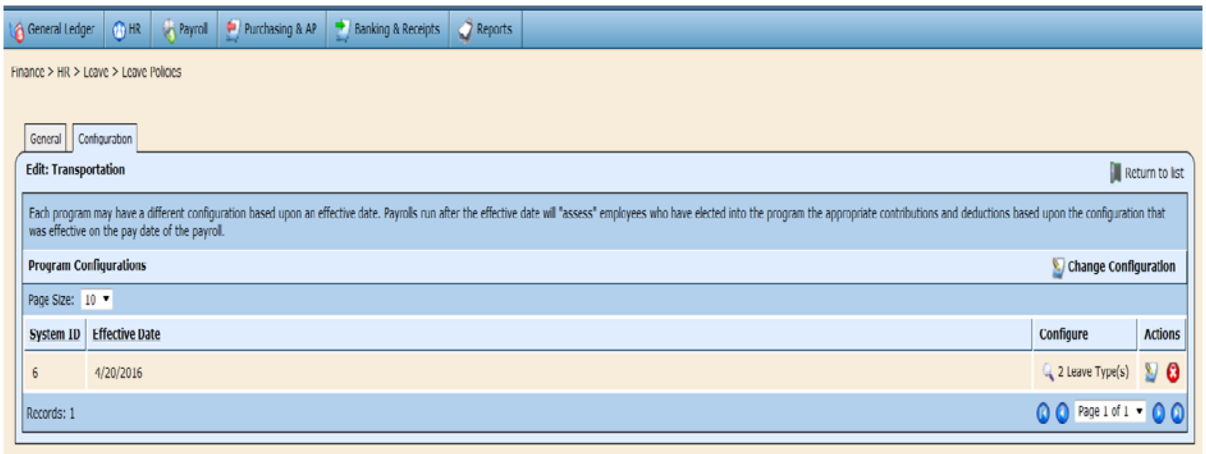


Enter the effective date of the leave policy.

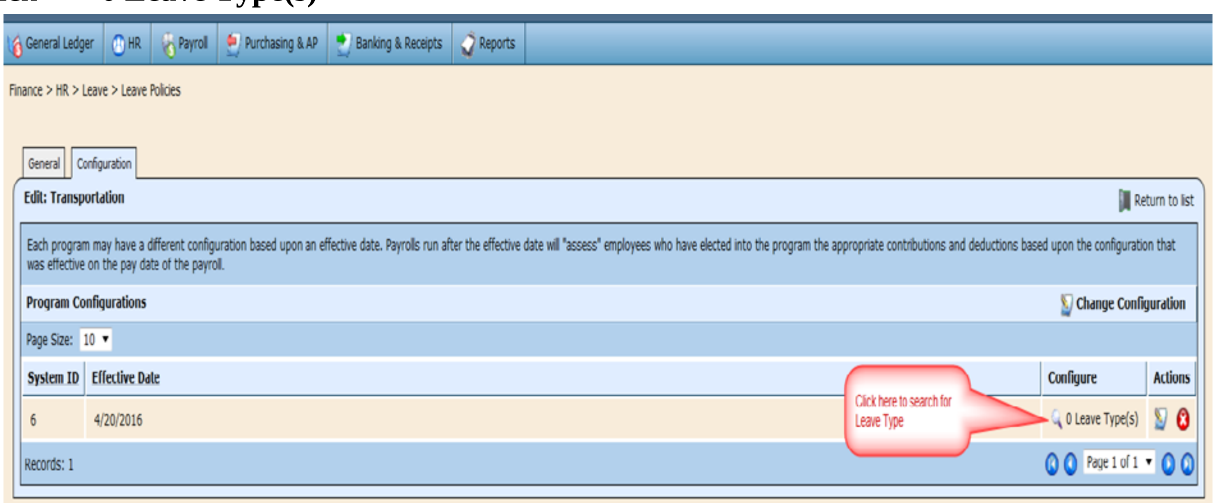
Click **Save**



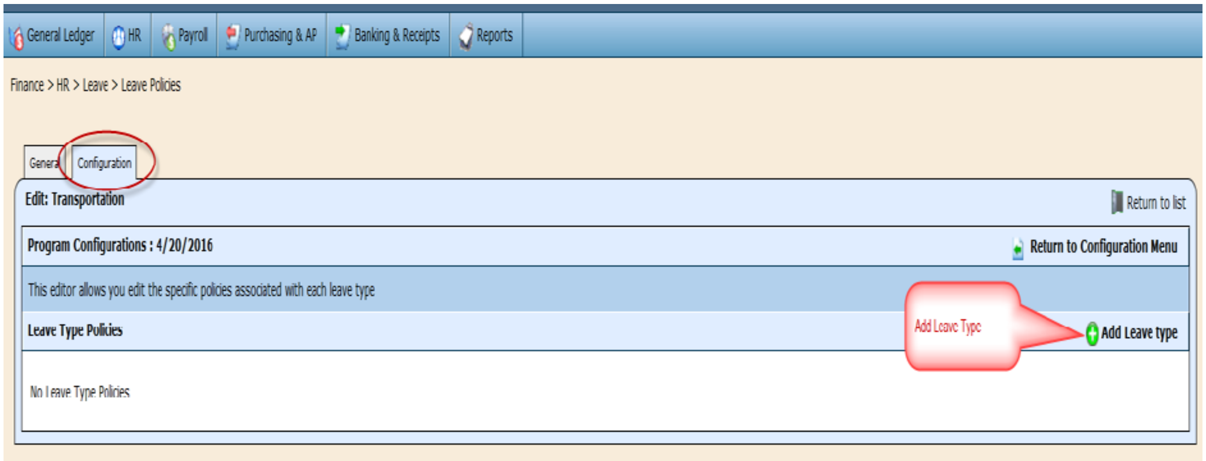
You will return to the Configuration Summary Screen.



Click **0 Leave Type(s)**

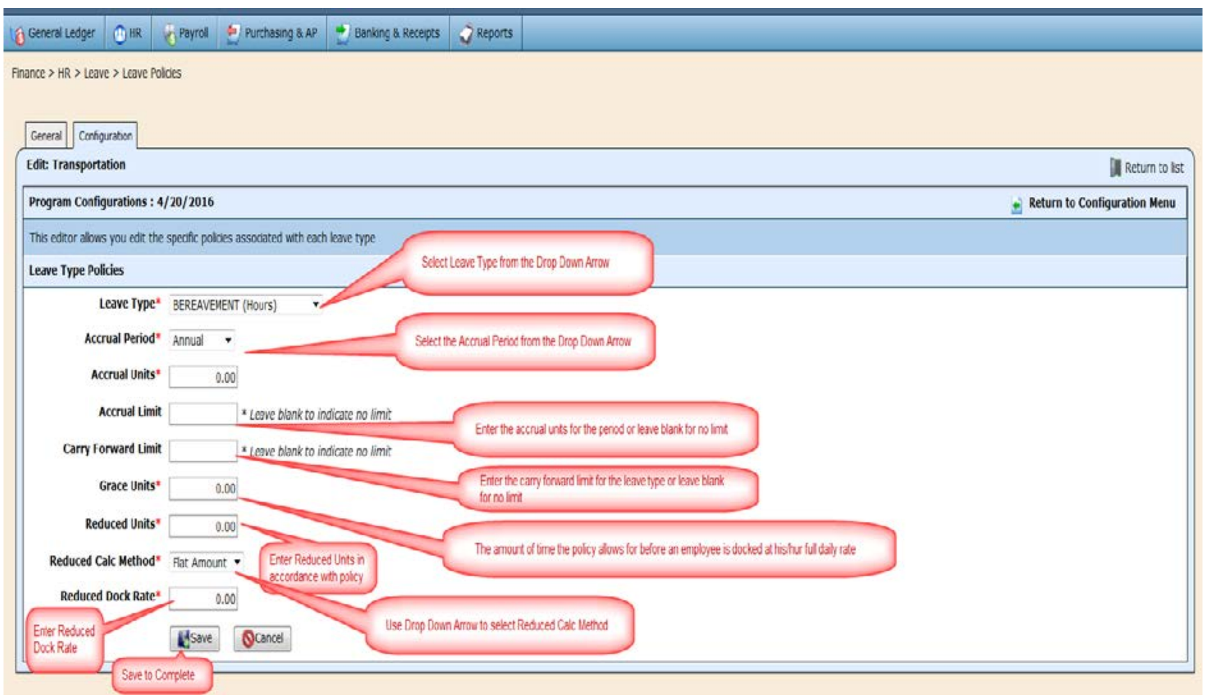


Click **Add Leave Type**



Enter the information in the Leave Type fields – See descriptions of fields below.

Click **Save**



- ➢ **Leave Type** - Select the leave form the drop down arrow.
- ➢ **Accrual Period** - Select the accrual period from the drop down arrow.
  - Annual - this option will accrue the Leave Type annually during the Promote Service Records process.
  - By Pay Period - this option will accrue the Leave Type each pay period during the payroll process.
- ➢ **Accrual Units -** Enter the accrual units for the period.

- **Accrual Limit -** Enter the accrual limit for the leave type or leave blank for no limit.
- **Carry Forward Limit -** Enter the carry forward limit for the leave type or leave blank for no limit.
- **Grace Units -** Enter the grace units of the leave if the policy allows days of grace before an employee is docked his/her full daily rate.
- **Reduced Units -** Enter the reduced units of the local leave if the policy allows days of reduced dock before an employee is docked his/her full daily rate.
- **Reduced Calc. Method -** Select the reduced calculation method from the drop down arrow choosing the flat amount or percentage method.
- **Reduced Dock Rate -** Enter the reduced dock rate if local leave policy docks an employee at a reduced dock. For example, a school may dock at a reduced substitute rate rather than an employee's full daily rate.

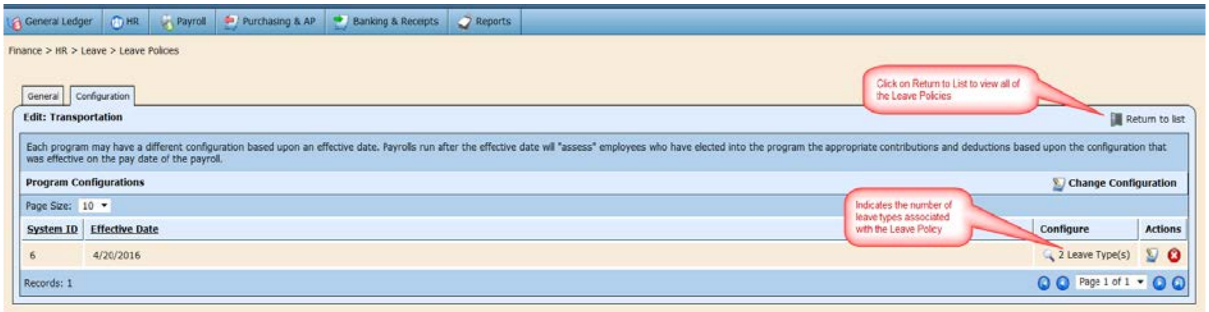
Continue the same procedures until all appropriate leave types are added to the policy.

You will see a summary screen.

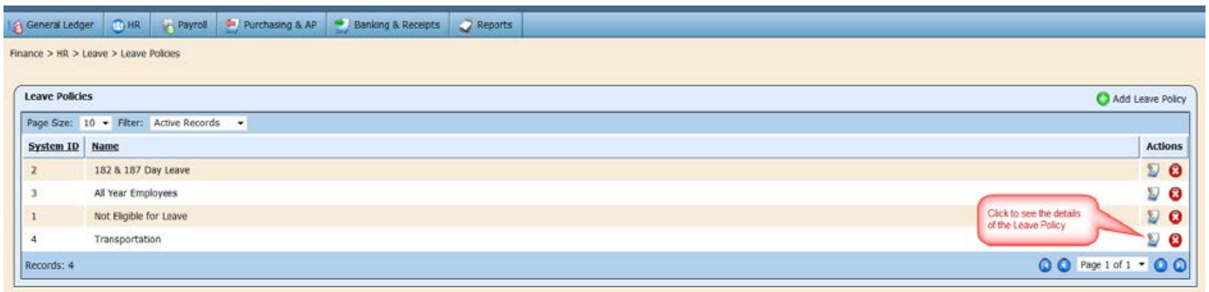
Click **Return to Configuration Menu**

This will return you to the Summary Screen detailing how many leave types that Policy has. If you want to see each item:

Click on to get to the itemized screen.



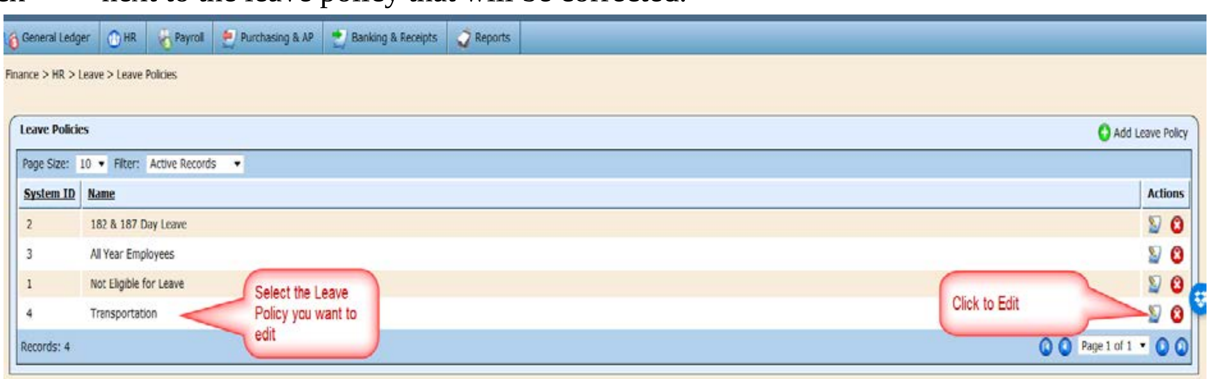
Click on to see the details of that leave policy.



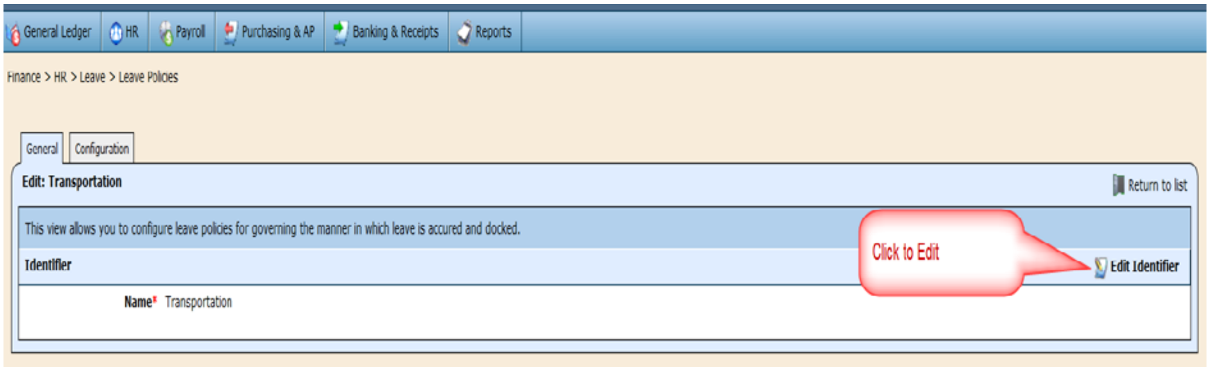
Edit a Leave Policy

Finance *> HR > Leave > Leave Policies*

Click next to the leave policy that will be corrected.

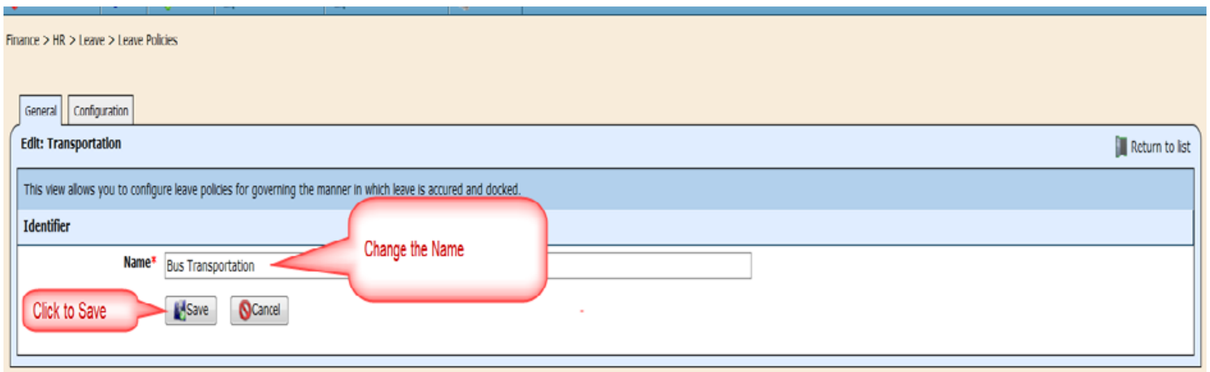


Click **Edit Identifier**



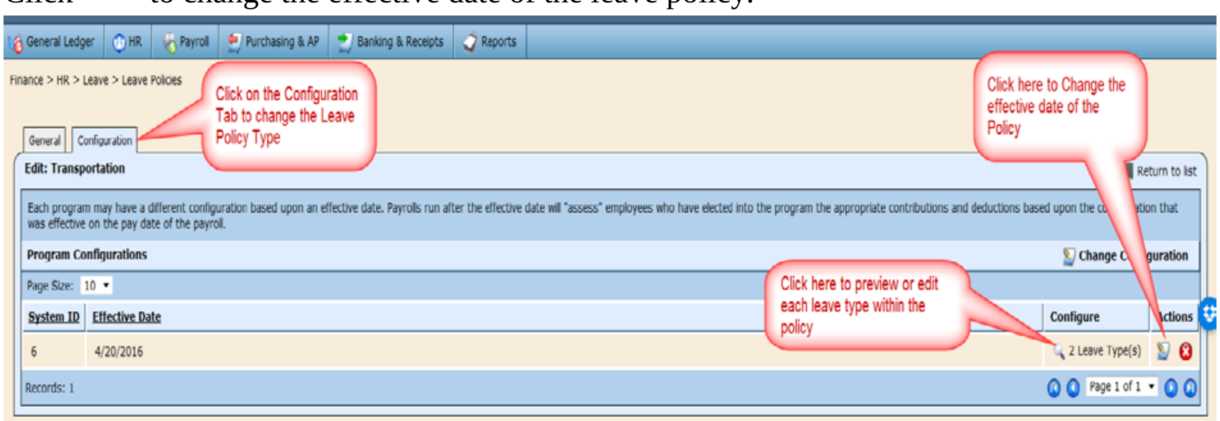
Correct the name if applicable.

Click **Save**



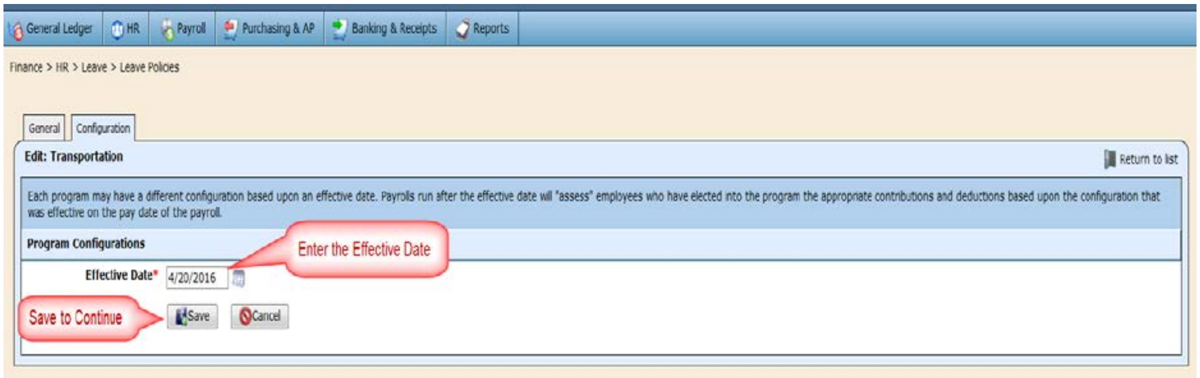
Click on the Configuration Tab.

Click to change the effective date of the leave policy.



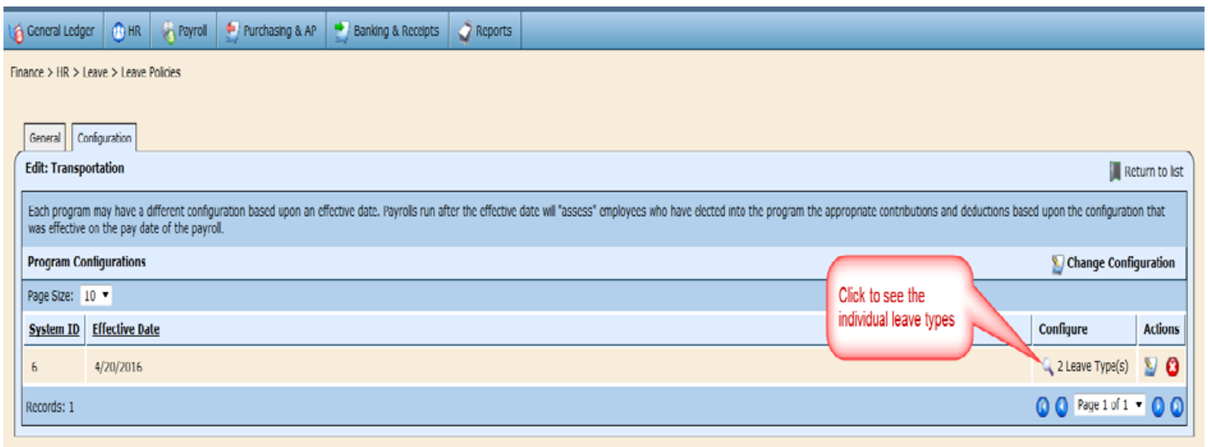
Change the effective date of the policy if applicable.

Click **Save**



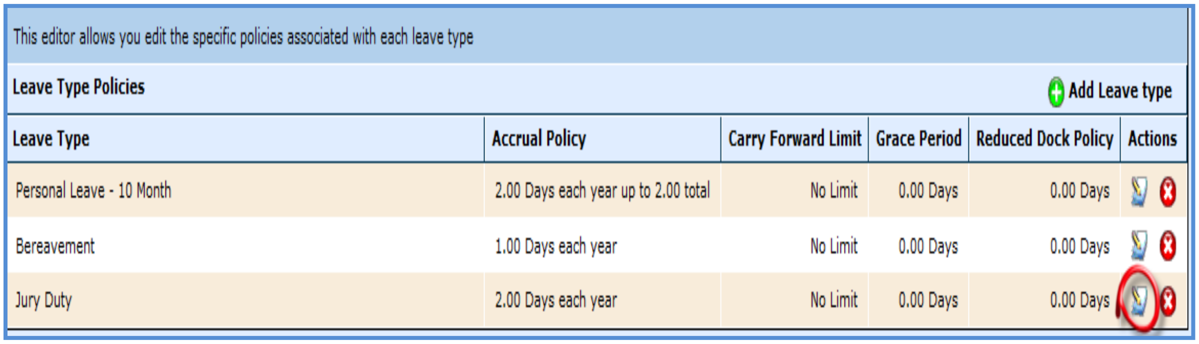
You will return to the Configuration summary screen.

Click to view the leave types within the leave policy.



Click next to the leave type to be corrected.

Click next to the leave type to be corrected.



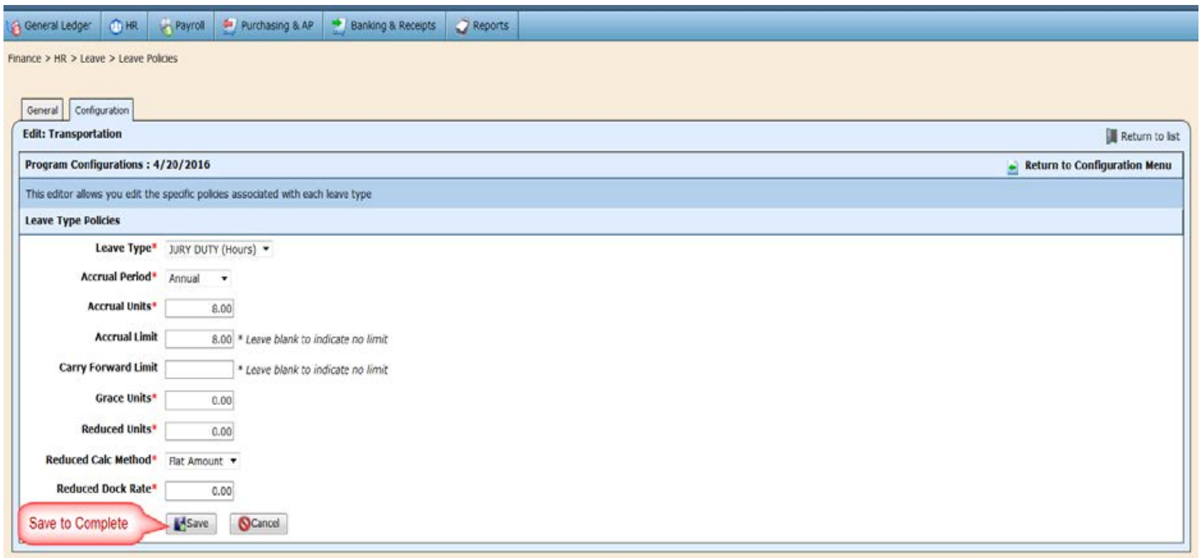
This editor allows you edit the specific policies associated with each leave type

Leave Type Policies — Add Leave type

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days	
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days	
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days	

Correct the appropriate fields

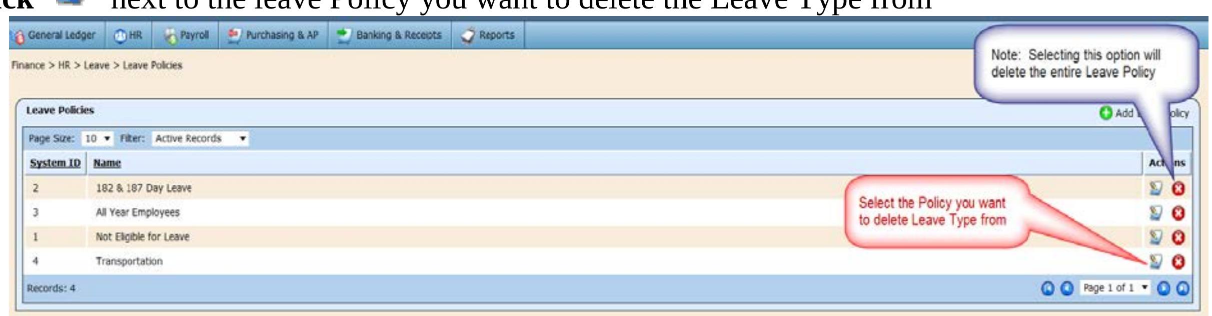
Click **Save**



Delete a Leave Policy Type

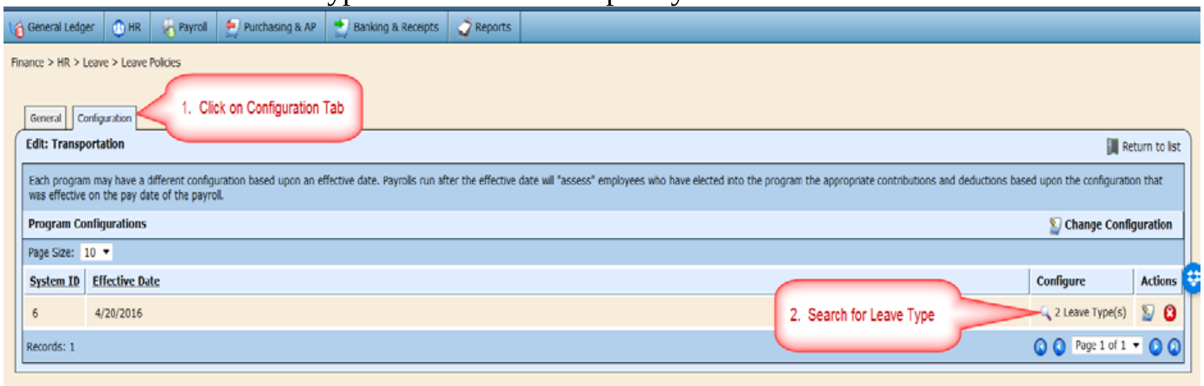
***Finance** > HR > Leave > Leave Policies >*

Click next to the leave Policy you want to delete the Leave Type from

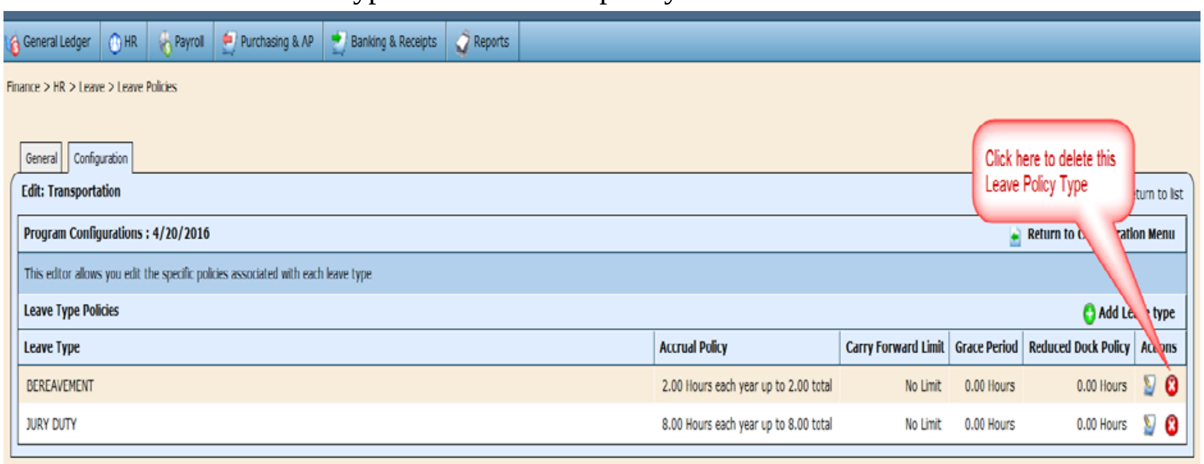


Select **Configuration** Tab

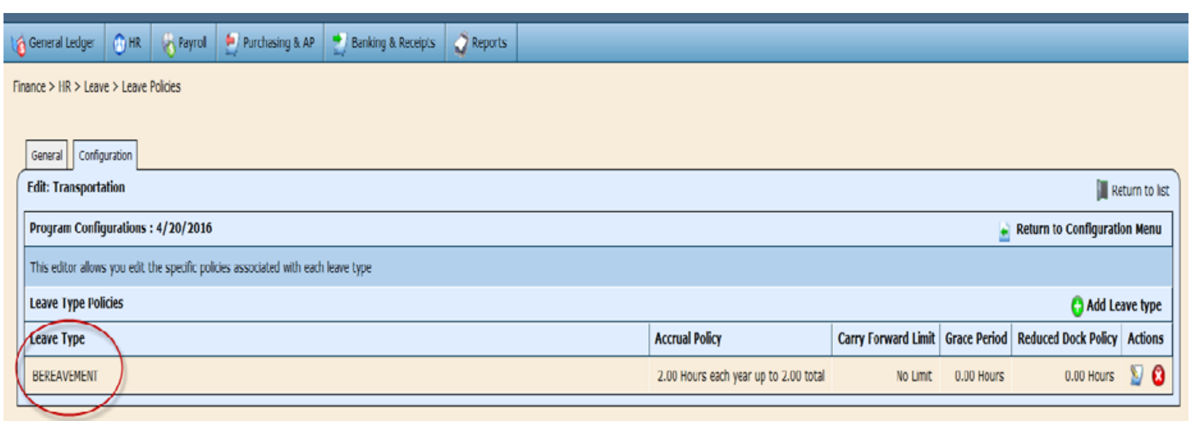
Click to view the leave types within the leave policy.



Click on to delete a leave type from the leave policy.



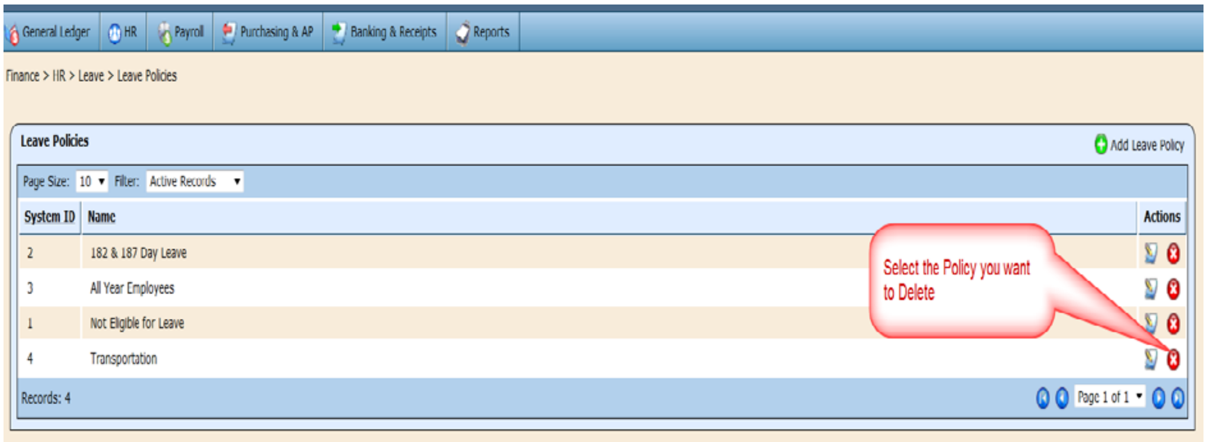
You will return to the summary screen where you will no longer see the Leave Type that was deleted.



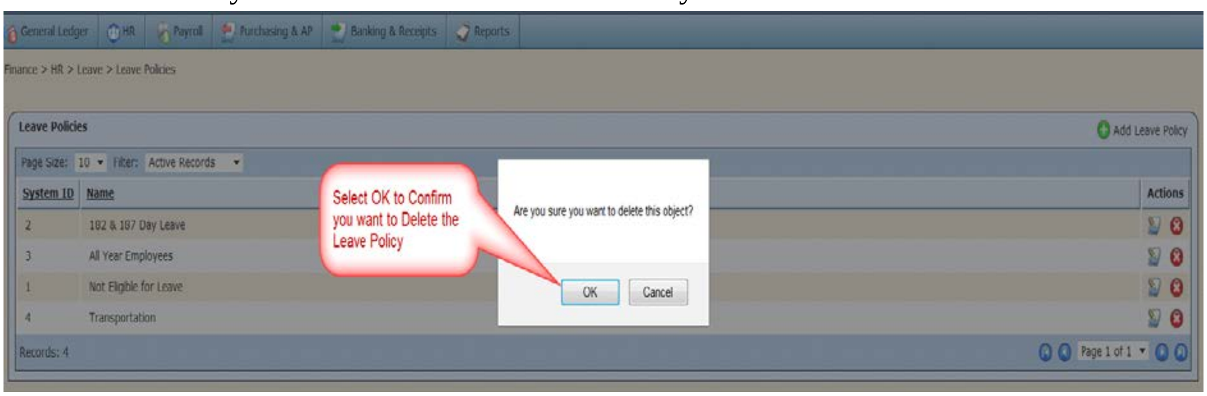
Delete a Leave Policy

Finance *> HR > Leave > Leave Policies*

Click next to the leave policy that will be deleted.



Click OK to confirm you want to Delete the Leave Policy



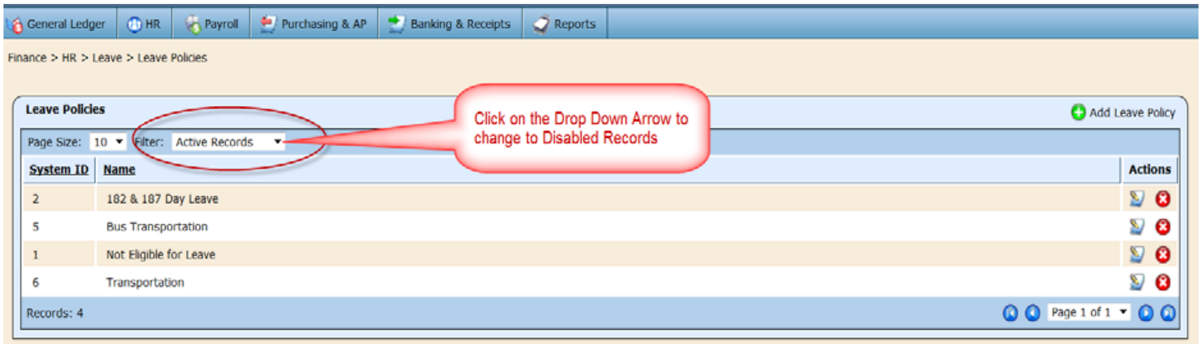
Restore a Deleted Leave Policy

If a leave policy has been deleted but has never been used during a payroll process it will be permanently deleted.

If a leave policy has been used during one or more payroll processes then the deleted leave policy moves from the <u>active</u> records to <u>disabled</u> records. If this leave policy was deleted in error follow the below steps to restore the leave policy.

Finance *> HR > Leave > Leave Policies*

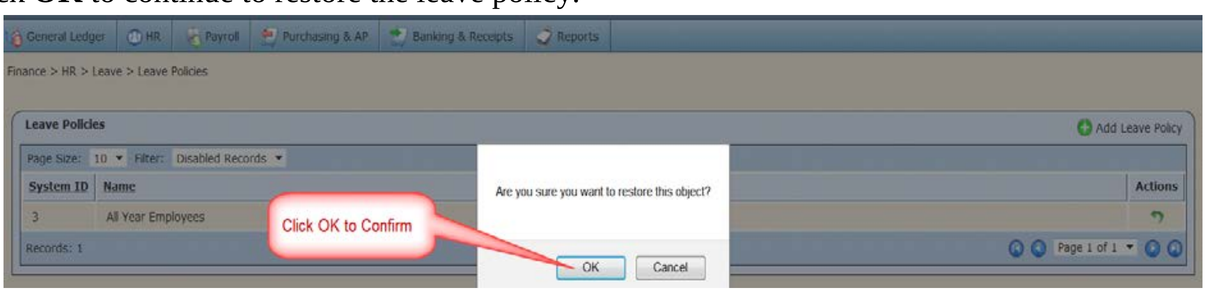
Active Records



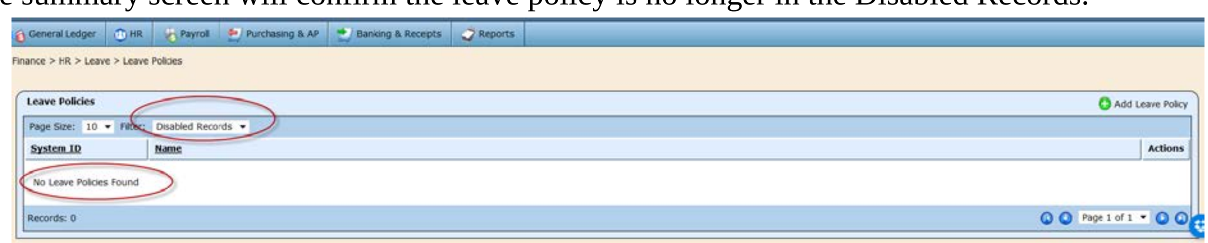
Click on  to restore the leave policy to active from the Disabled Records.

Disabled Records

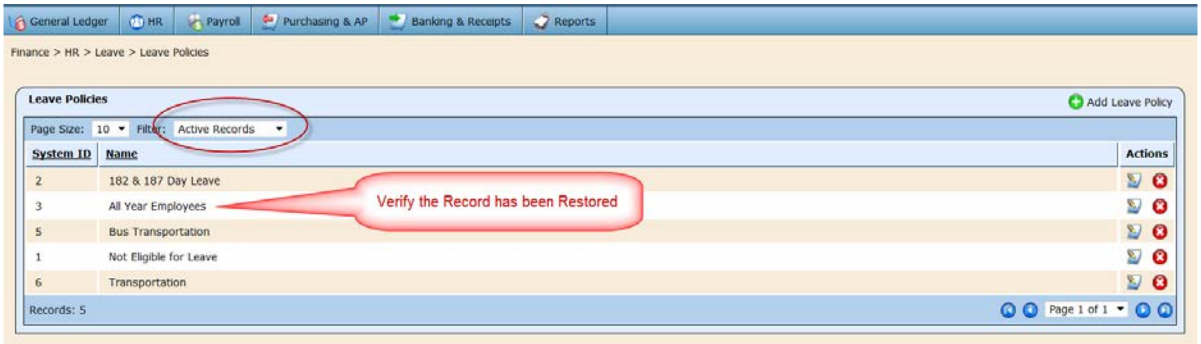
Click **OK** to continue to restore the leave policy.



The summary screen will confirm the leave policy is no longer in the Disabled Records.



Return to Active Records to verify the Leave Policy has been restored.

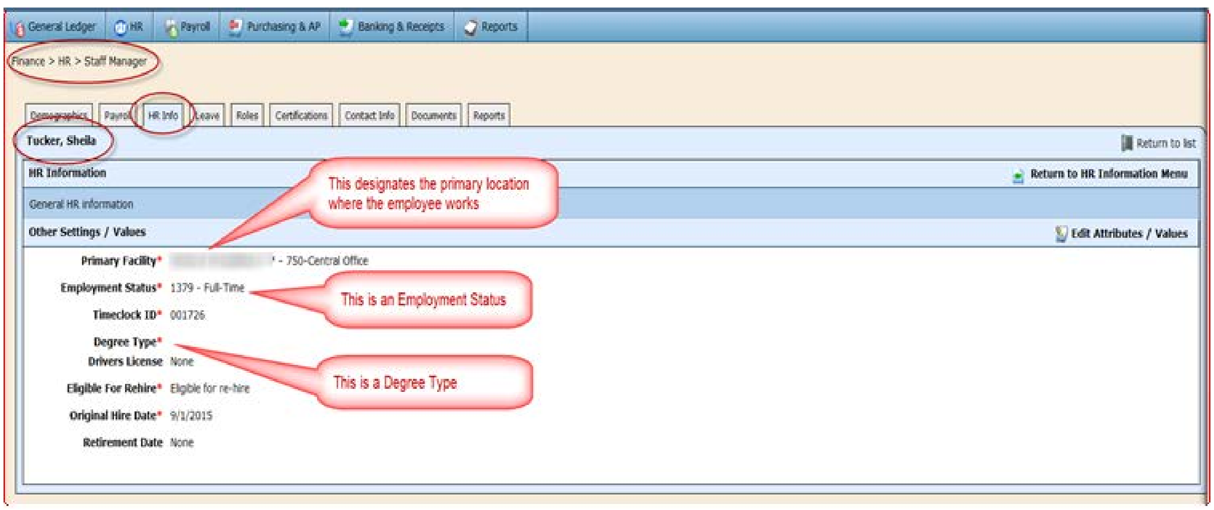


Chapter 5
Support Codes

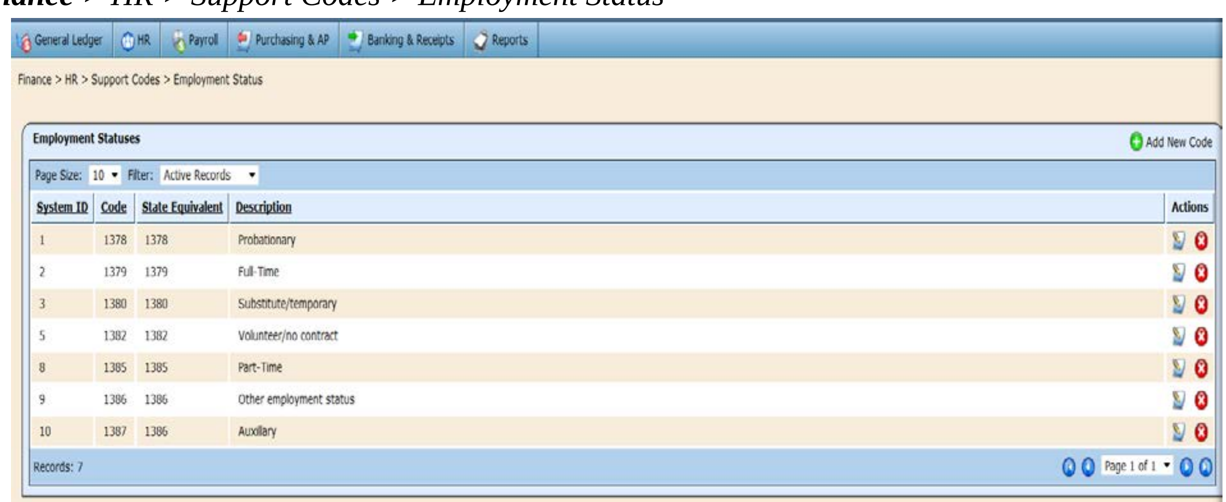
Employment Status

An Employment Status is assigned to employees to determine if they are probationary, full-time, substitute, etc. It defines the nature of an employee's relationship with the organization.

Below is an example of where the information is linked to the employee's HR Info.



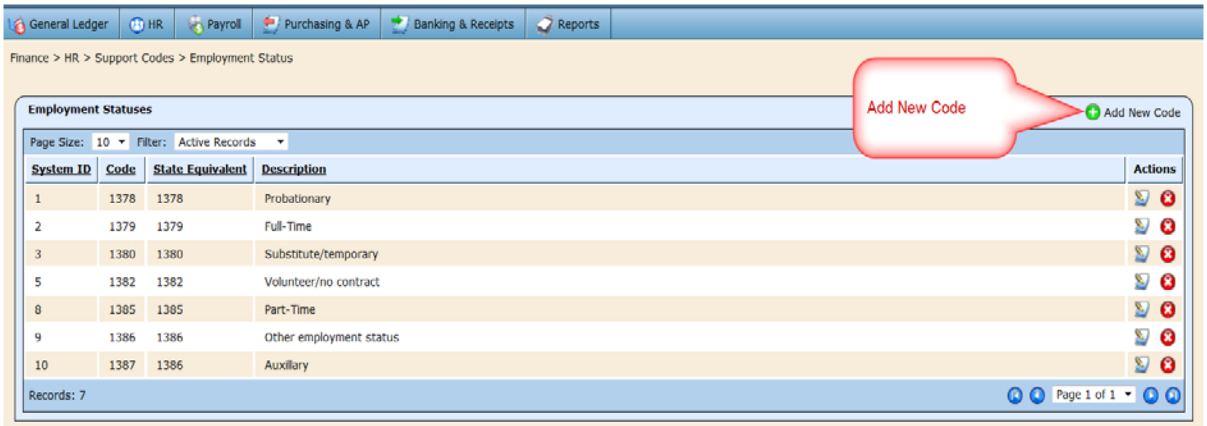
***Finance** > HR > Support Codes > Employment Status*



Adding a New Employment Status Code

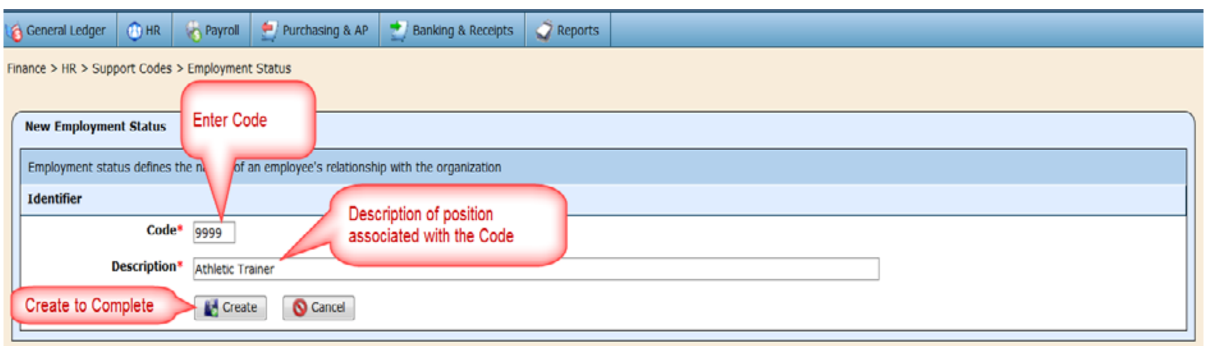
Finance *> HR > Support Codes > Employment Status*

Click on **Add New Code**

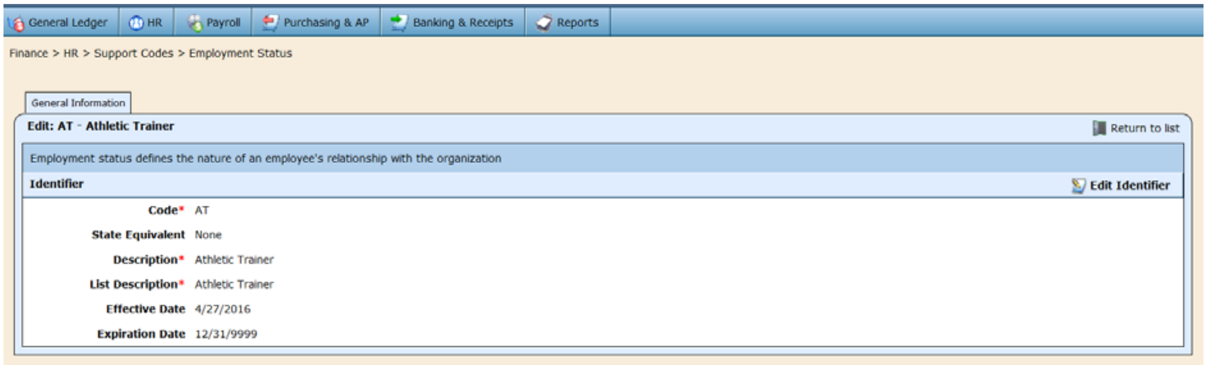


Enter the description of the position associated with the code (recommend using same code as the State Equivalent Code).

Click **Create**



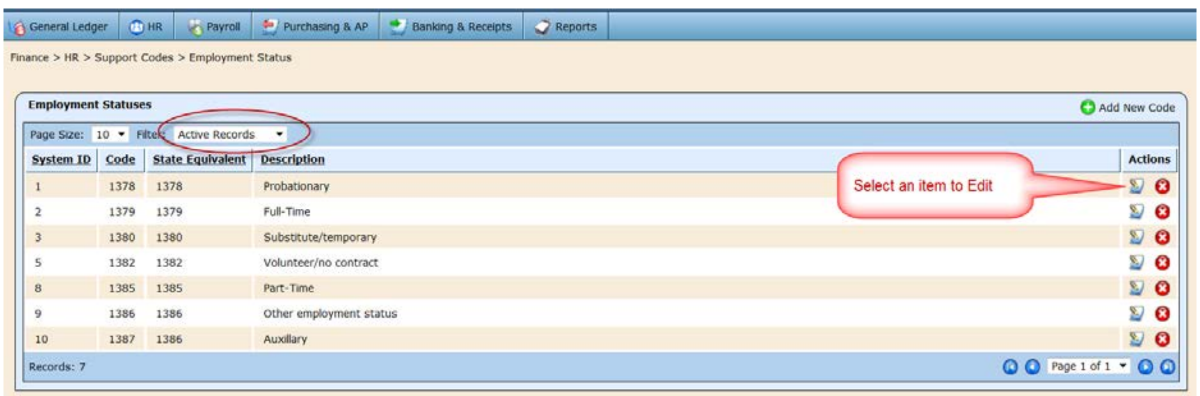
A summary screen will appear. Verify the information you have entered is correct. If it is not, refer to the Edit an Existing Employment Status Code.



Edit an Existing Employment Status Code

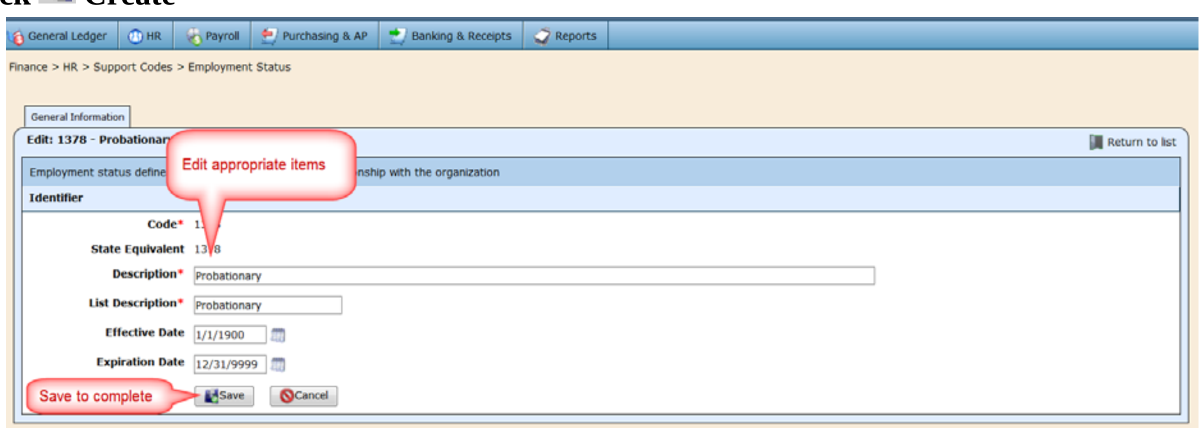
Finance *> HR > Support Codes > Employment Status*

Click Edit

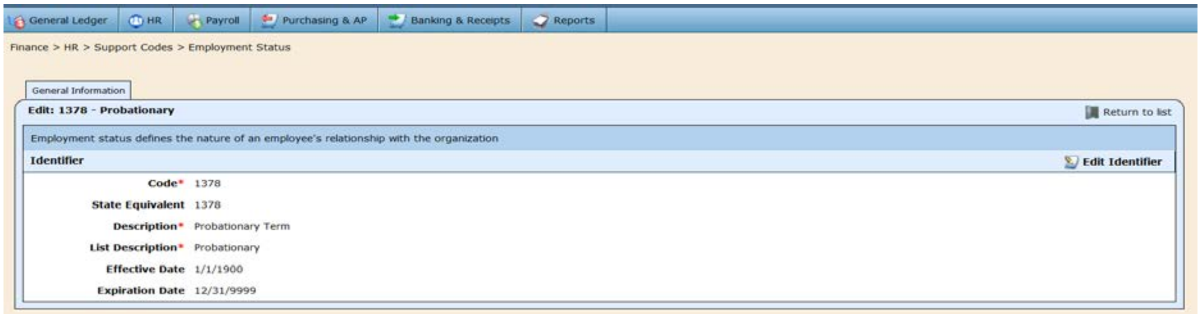


Edit the appropriate items.

Click Create



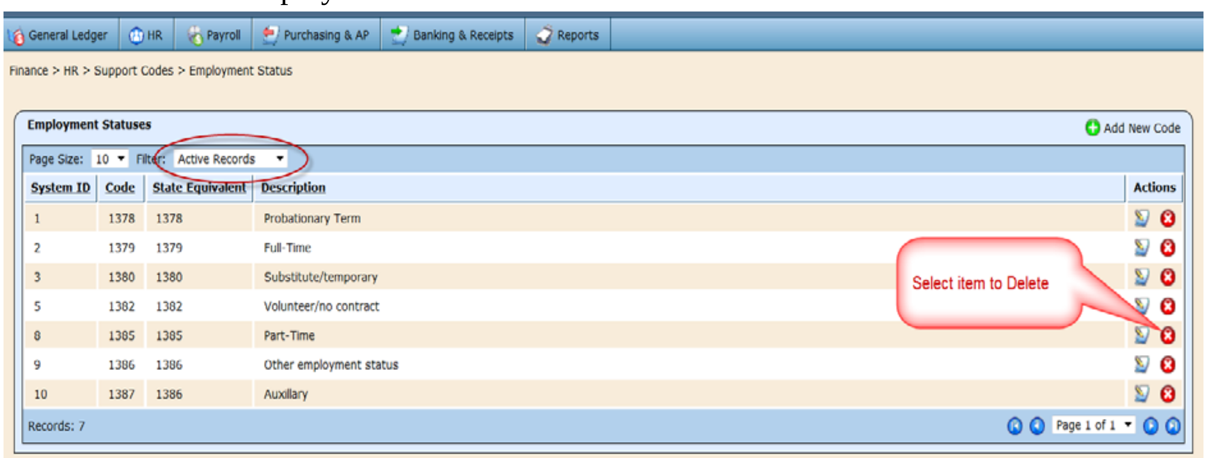
The summary screen will show changes. Verify the changes are correct. If not, return to Edit Identifier.



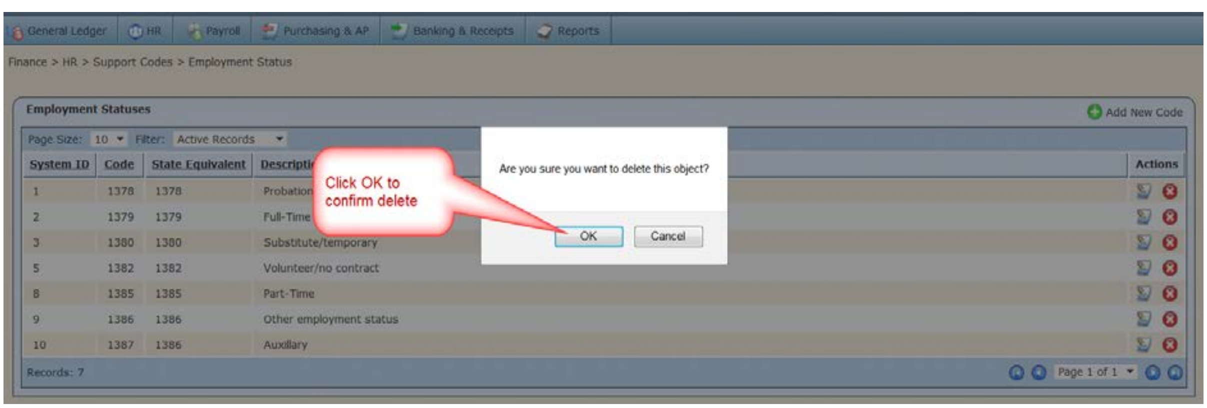
Deleting an Employment Status Code

***Finance** > HR > Support Codes > Employment Status*

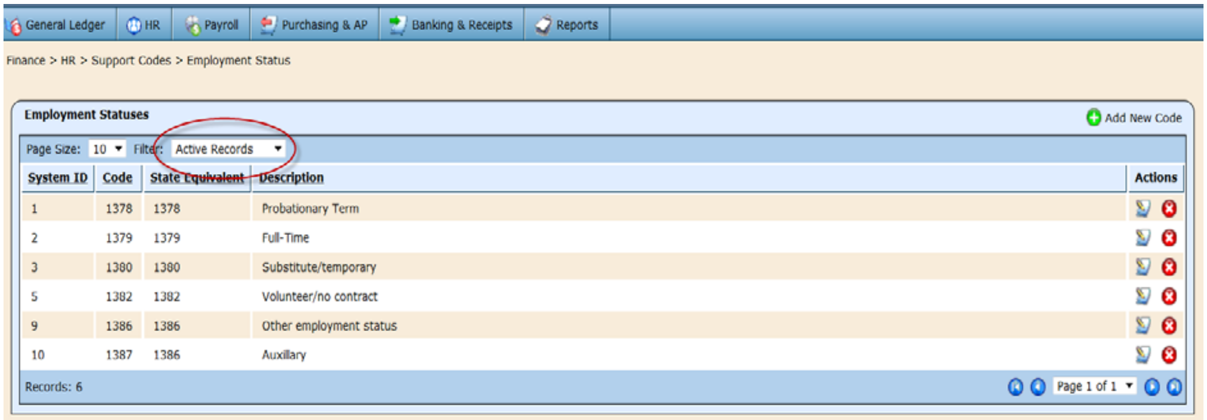
Click next to the Employment Status to be deleted.



Click **OK** to confirm deletion of the item.



The item will no longer be shown in the Active Records.

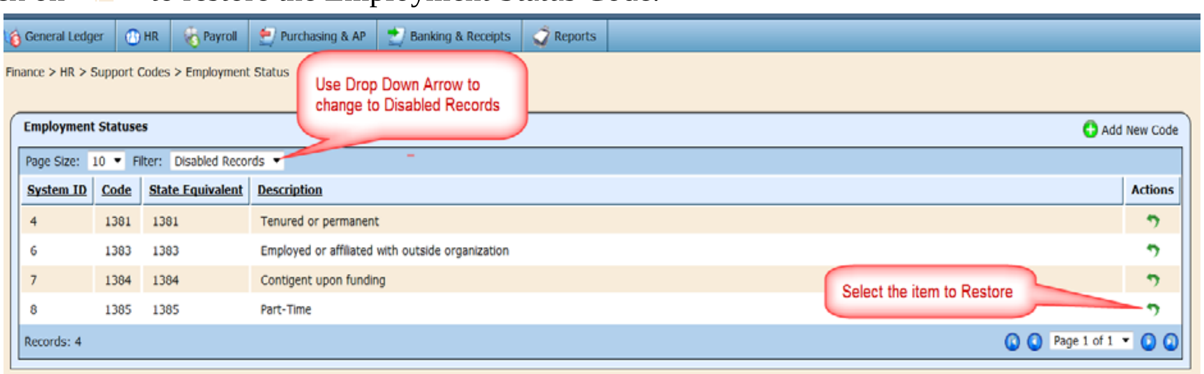


Restore an Employment Status Code

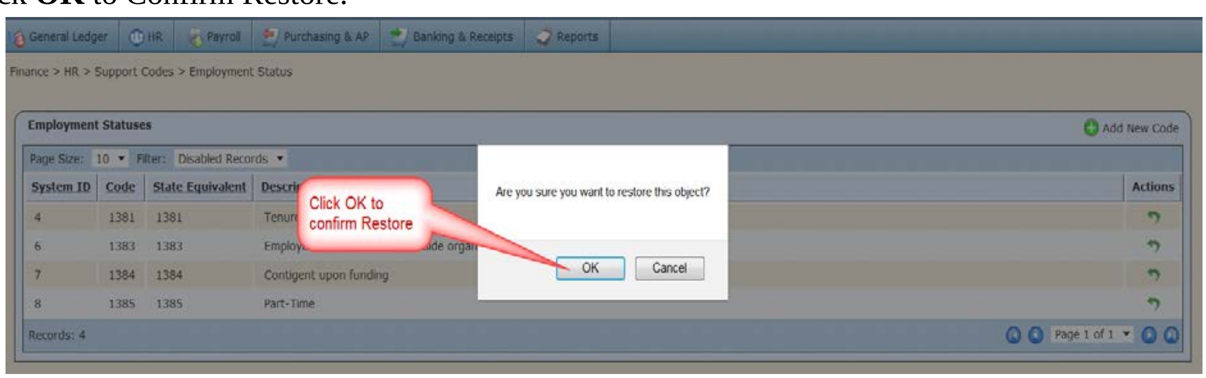
Finance *> HR > Support Codes > Employment Status*

Change to Disabled Records on the Filter by using the drop down arrow.

Click on to restore the Employment Status Code.

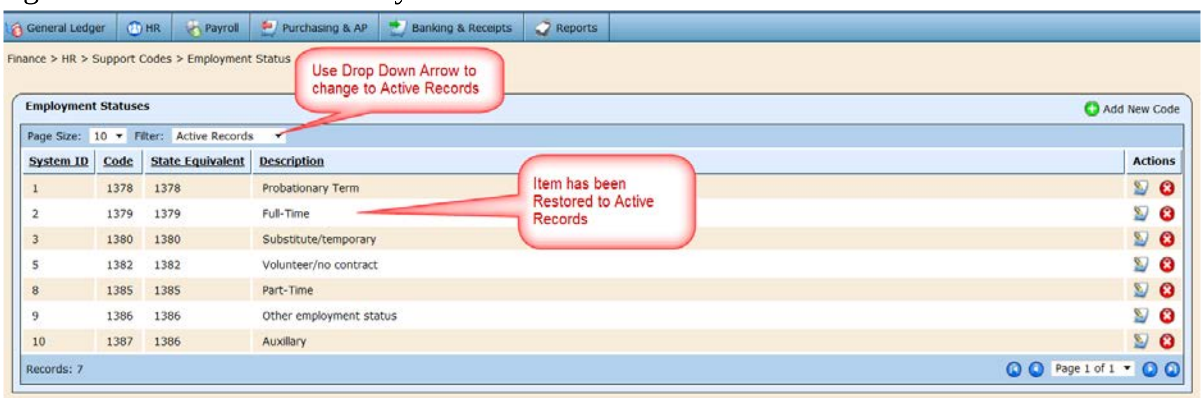


Click **OK** to Confirm Restore.



The item will no longer be shown in Disabled Records.

Change to Active Records to verify the item has been Restored



Degree Type

Degree Types can be locally defined now and linked to a State code for PEIMS reporting.

Adding a Degree Type

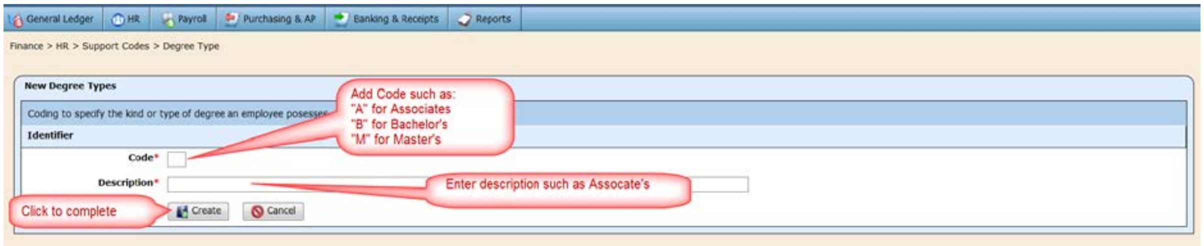
Finance *> HR > Support Codes > Degree Type*

Note: This is an existing feature; however, the Associate's Degree has been added as a selection. The Associates Degree can be selected, if appropriate, on the employee's HR record on the HR Info tab under General HR Attributes.

Click **Add New Code**

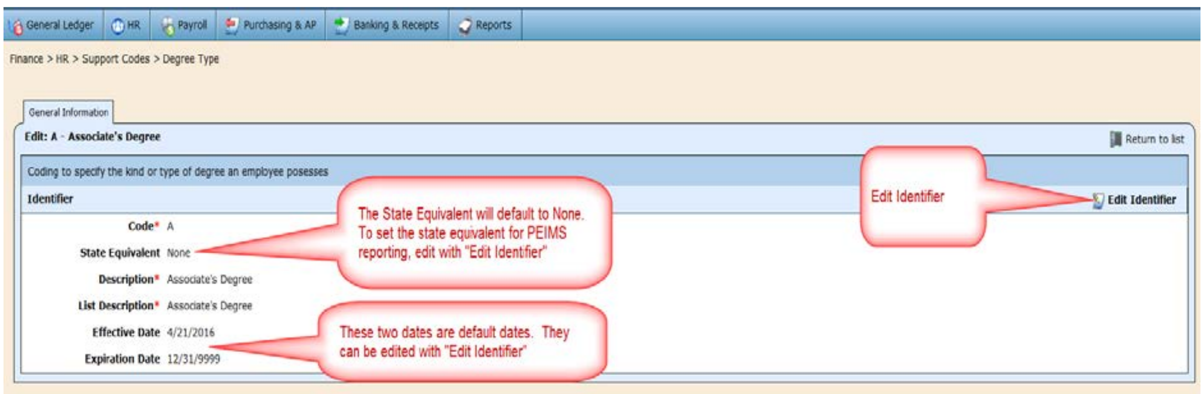
Enter information in the fields. A description of the fields is shown below.

Click **Create**



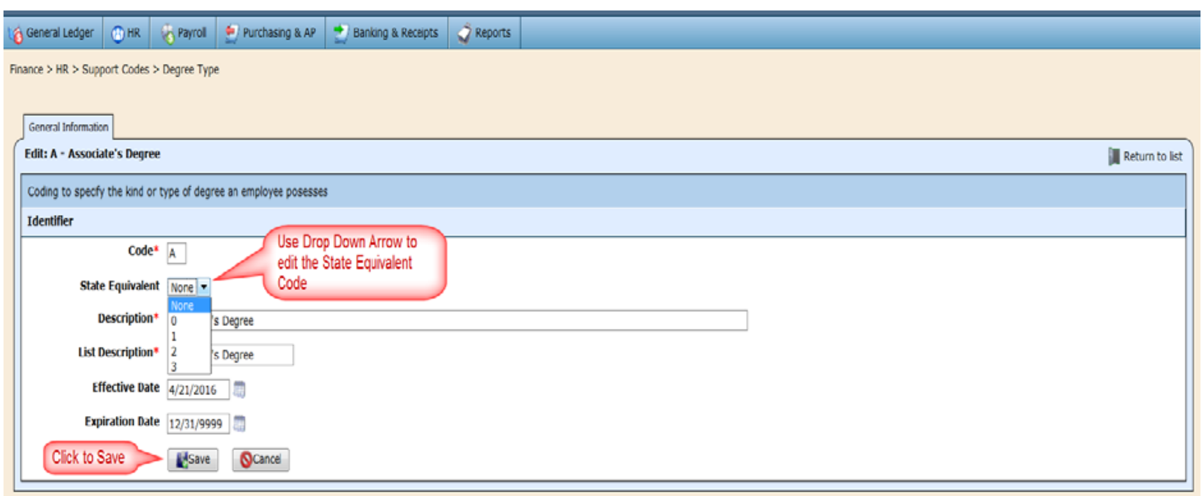
- **Code -** Enter a code for the degree type to be entered.
- **Description –** Enter a description for the degree type

You will see a summary screen. Verify the information is correct. If not, refer to Edit Degree Type.



State Equivalent – This field defaults to "None" when the Degree Type is created. To change for PEIMS reporting, Edit Identifier and use the drop down arrow to select the appropriate option.

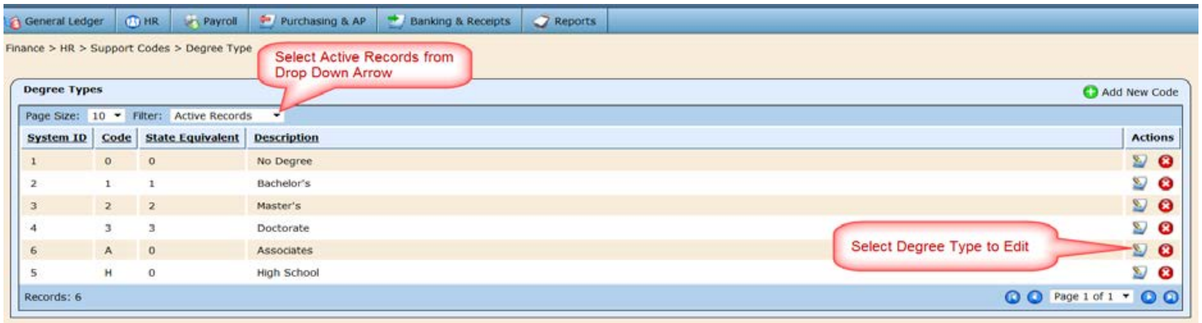
Click **Save**



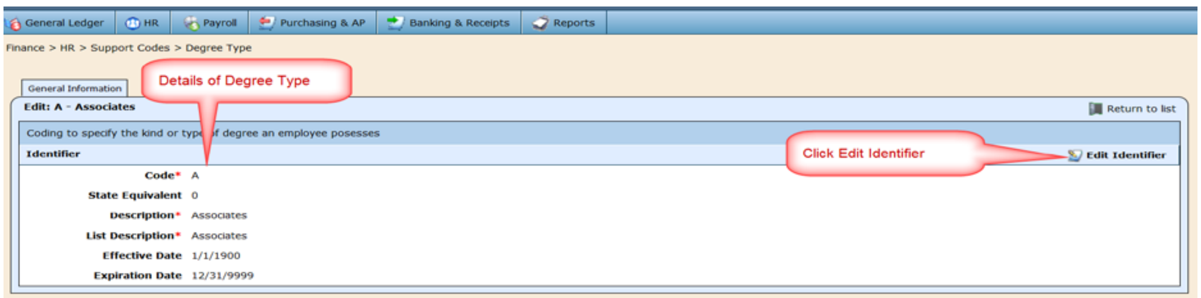
Edit Degree Types

Finance *> HR > Support Codes > Degree Type*

Click **Edit Degree Type**

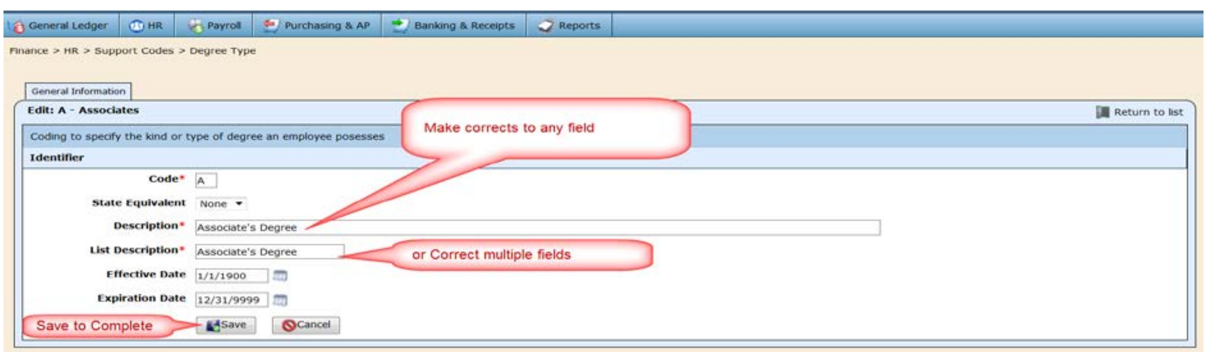


Click **Edit Identifier**

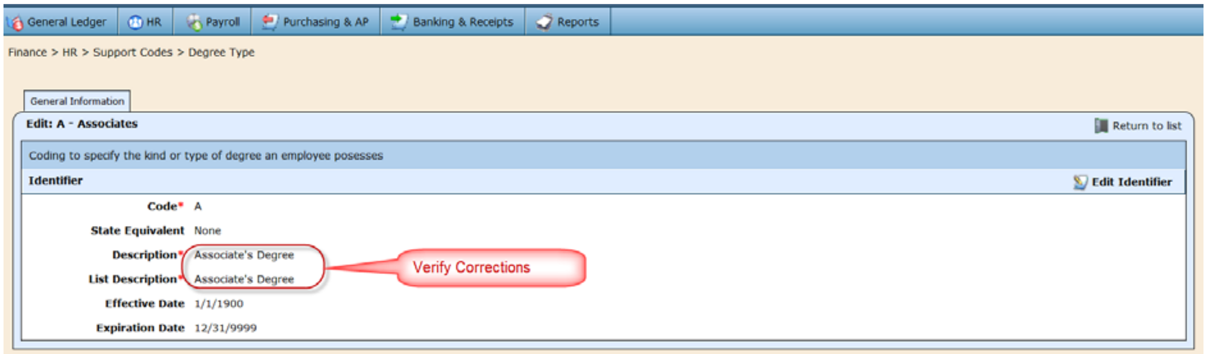


Make all necessary corrections.

Click **Save**



A summary screen will appear. Verify it is correct. If not, return to Edit Identifier.



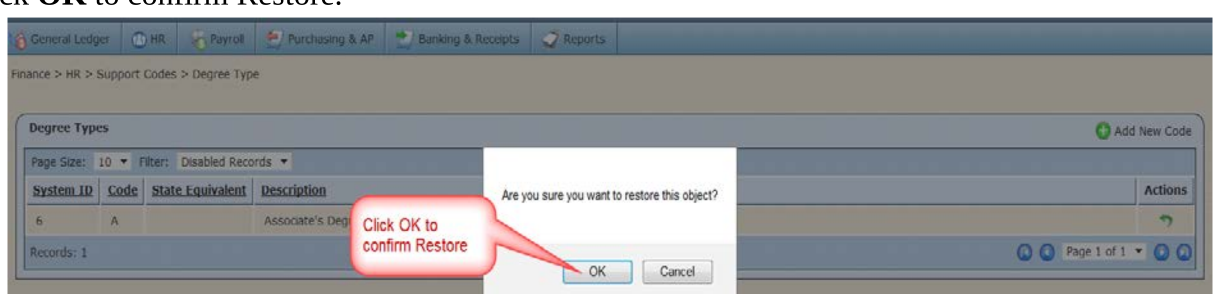
Restore Degree Types

Finance > HR > Support Codes > Degree Type

Select Disabled Records from Drop Down Arrow.

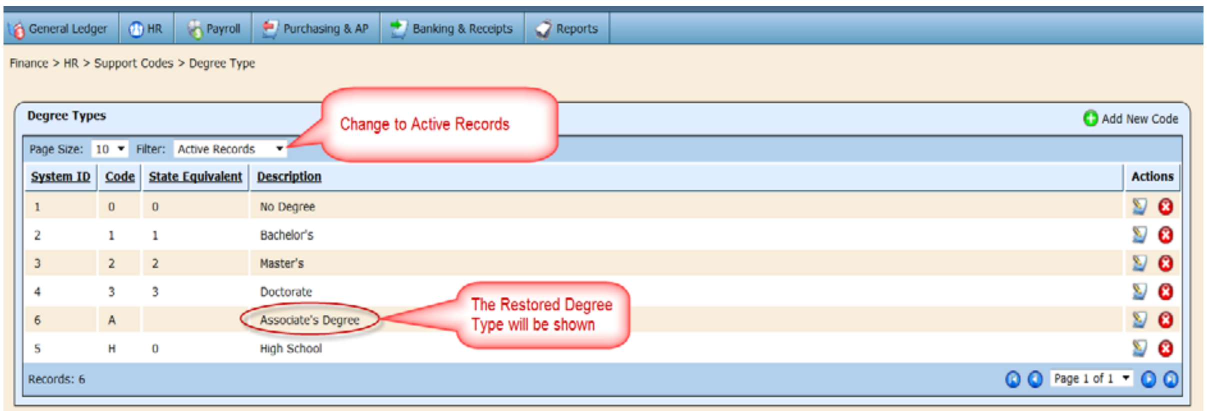
Click  to Restore

Click **OK** to confirm Restore.



The Degree Type will no longer be in the Disabled Records.

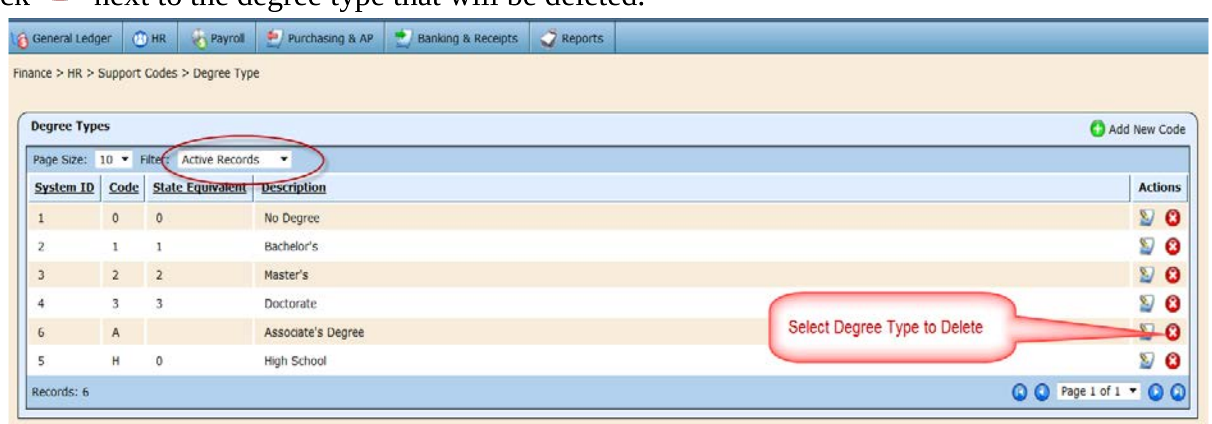
Change to Active Records to verify the Degree Type has been restored.



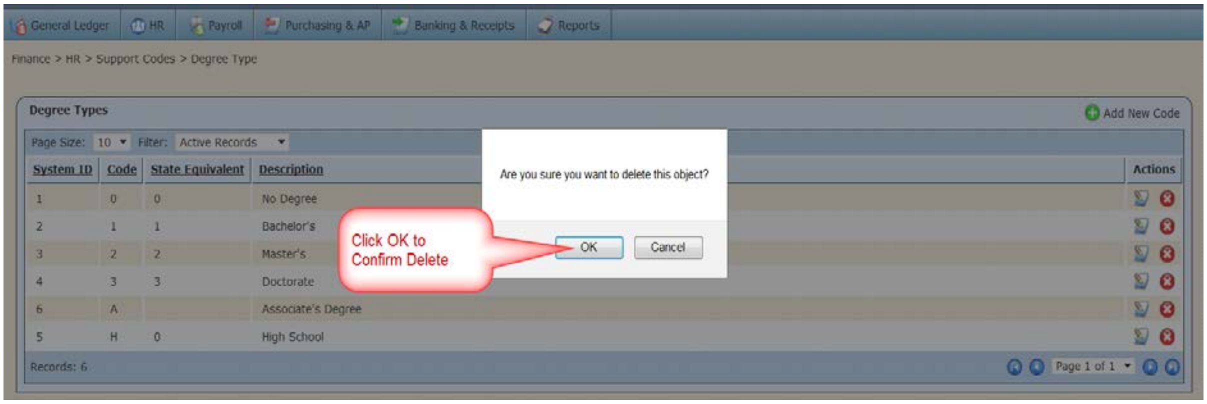
Delete Degree Types

Finance *> HR > Support Codes > Degree Type*

Click next to the degree type that will be deleted.



Select **OK** to delete.

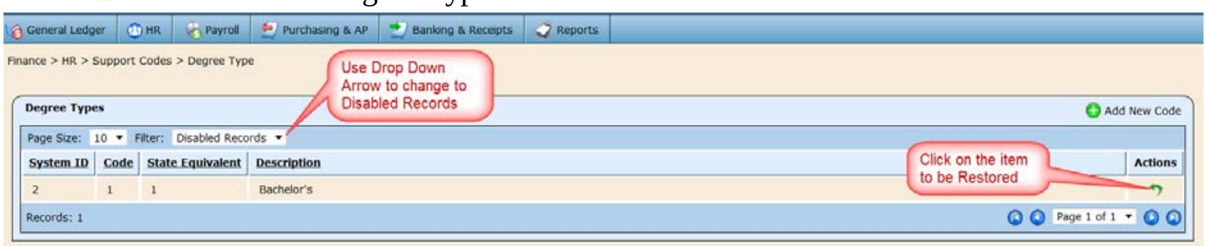


Restore a Degree Type

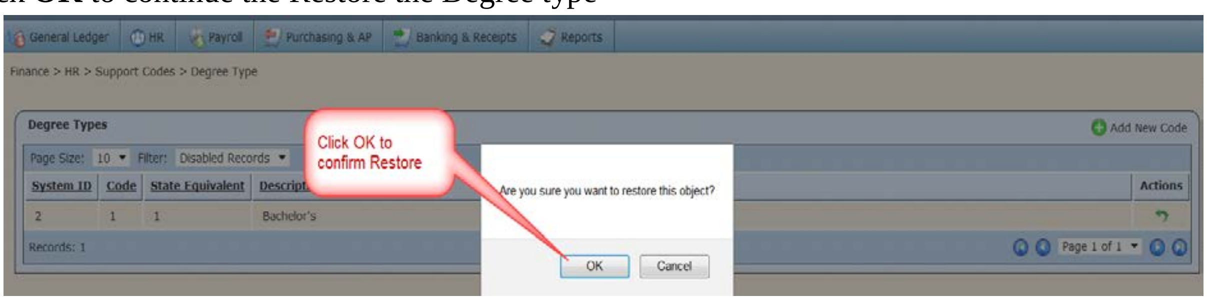
Finance *> HR > Support Codes > Degree Type*

Change to Disabled Records using the drop down arrow on the Filter.

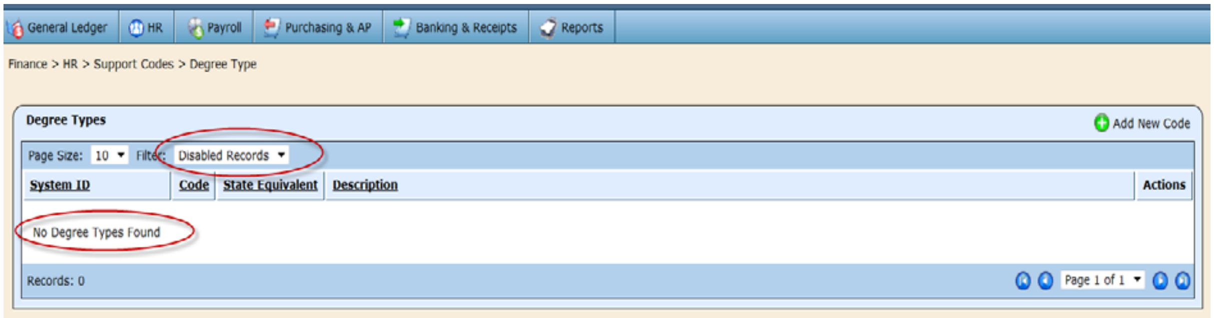
Click on  to restore the Degree Type



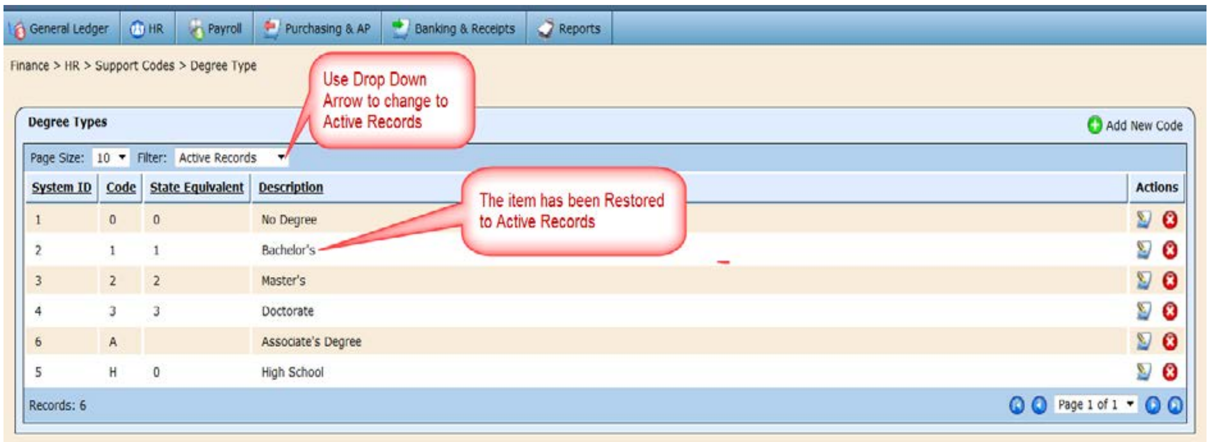
Click **OK** to continue the Restore the Degree type



The item is no longer in Disabled Records



The item has been restored to Active Records



Termination Codes

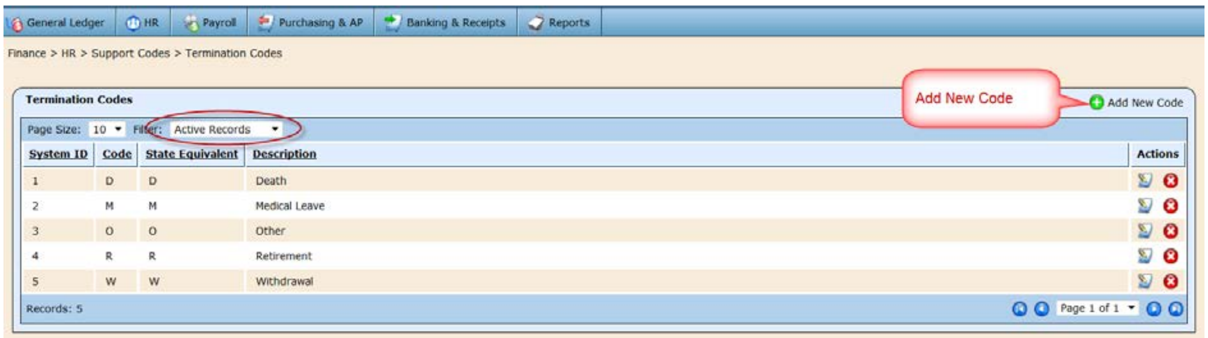
Termination codes are used when an employee leaves the district. Accurate use of termination codes are import for PEIMS and TRAQS reporting.

Finance *> HR > Support Codes > Termination Codes*

Adding a Termination Code

Finance *> HR > Support Codes > Termination Codes*

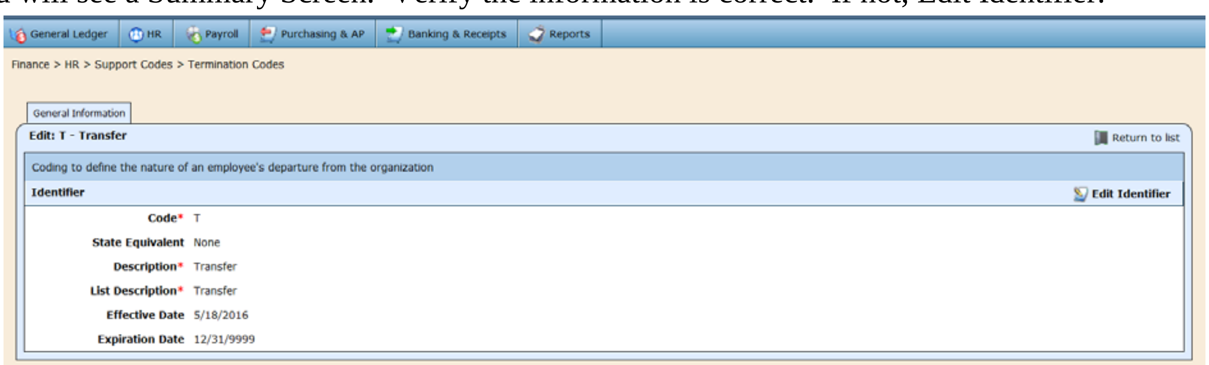
Click **Add New Code**



Enter the Code and Description

Click **Create**

You will see a Summary Screen. Verify the information is correct. If not, Edit Identifier.

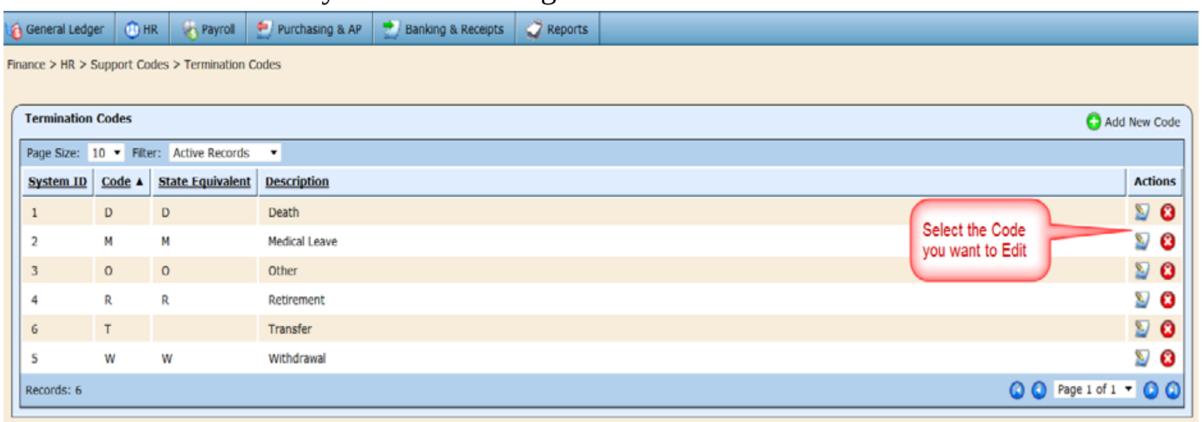


Return to List to see that the Termination Code has been added.

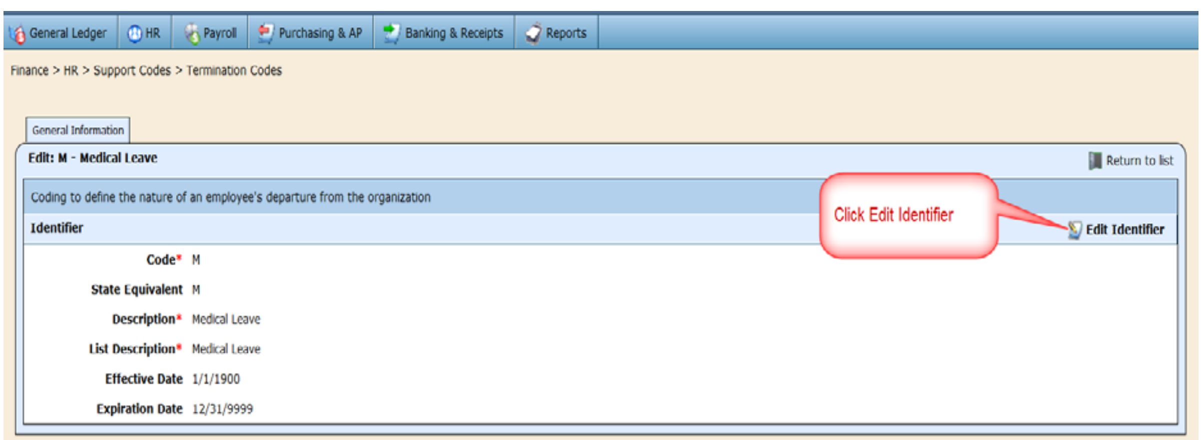
Editing a Termination Code

Finance *> HR > Support Codes > Termination Codes*

Click **Edit** for the code you want to change.

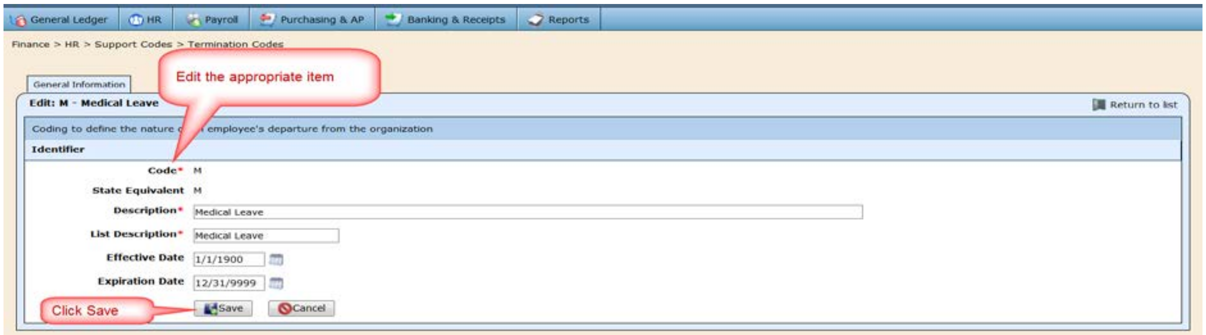


Click **Edit Identifier**

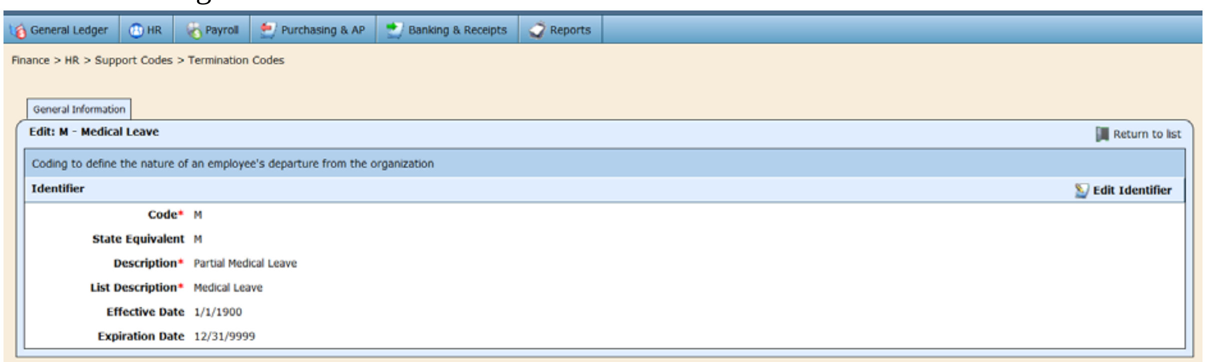


Edit the appropriate item

Click **Save**



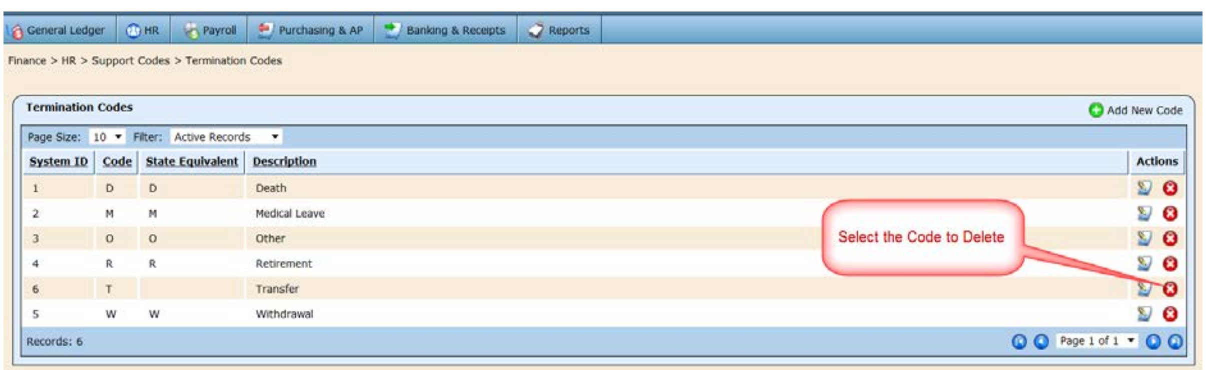
You will see a Summary Screen. Verify the changes are correct. If not, choose Edit Identifier and make changes.



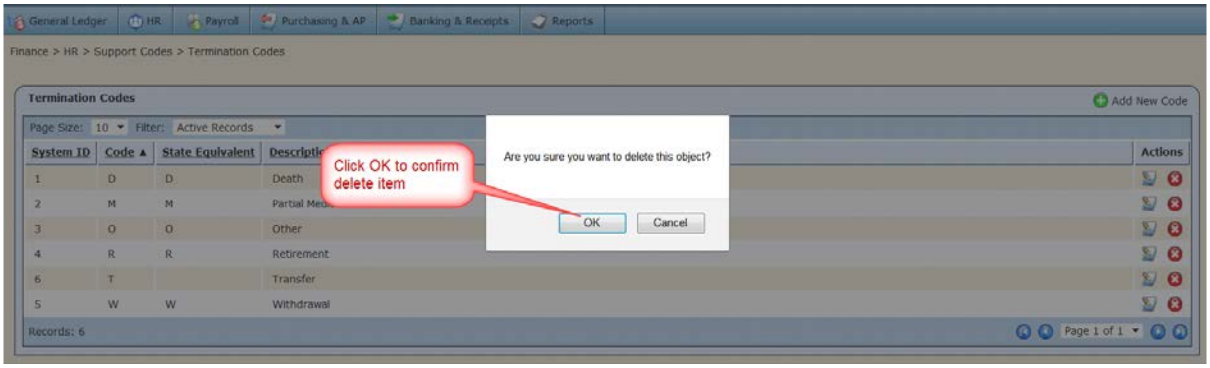
Deleting a Termination Code

***Finance** > HR > Support Codes > Termination Codes*

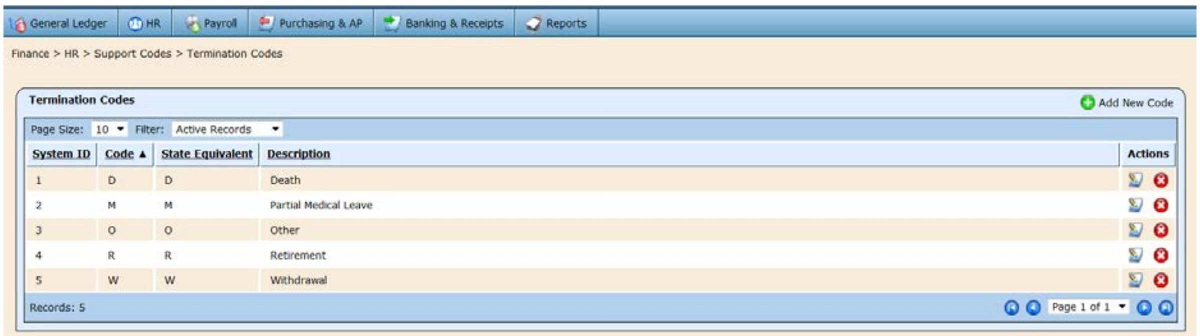
Click next to the termination code that will be deleted.



Click OK to confirm you want to delete the termination code.



The item will no longer be shown in the Active Records Filter.



Restoring a Termination Code

If a termination code has been deleted, but has *never been used during a payroll process* it will be permanently deleted.

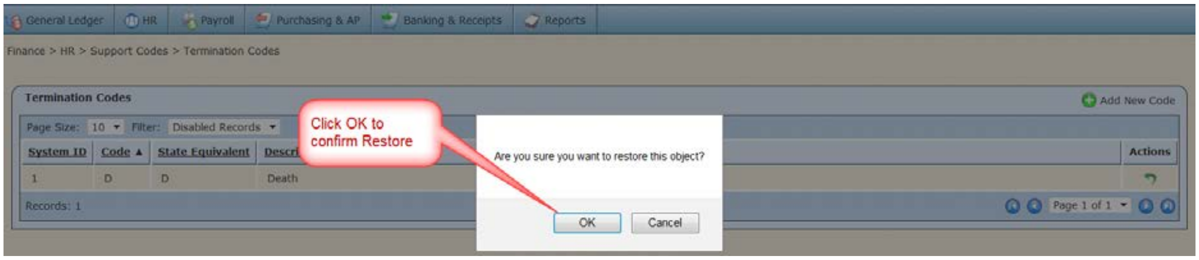
If a leave type has been used during one or more payroll processes, then the deleted leave type will move from the <u>active</u> records to <u>disabled</u> records. If this leave type was deleted in error, follow the following steps to restore the leave.

Finance *> HR > Support Codes > Termination Codes*

Change the Filter to Disabled Records.

Select  to Restore.

Click OK to confirm restore.



Change Filter to Active Records using the drop down arrow. Confirm the items was restored.

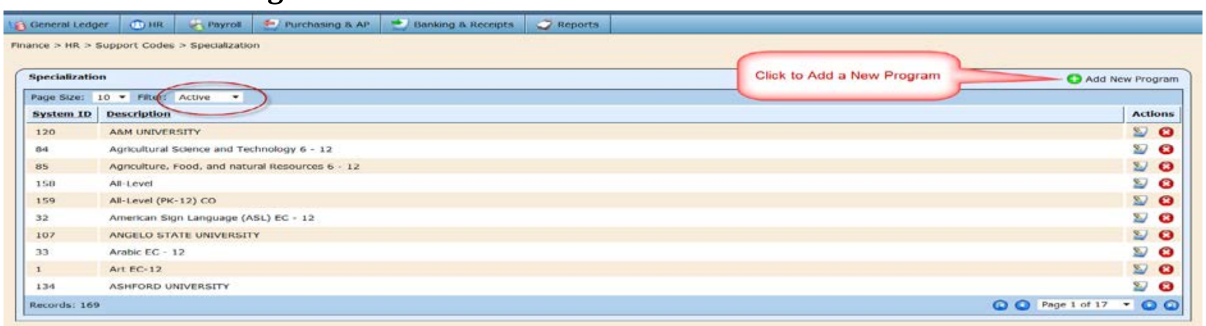
Specialization

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

Adding a Specialization

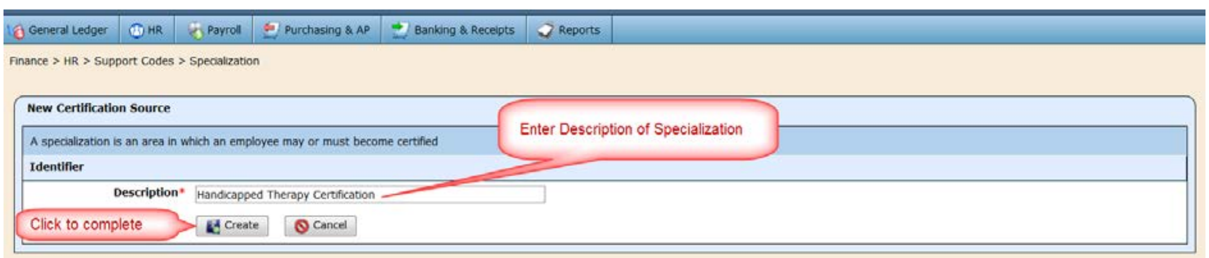
Finance *> HR > Support Codes > Specialization*

Click **Add New Program**

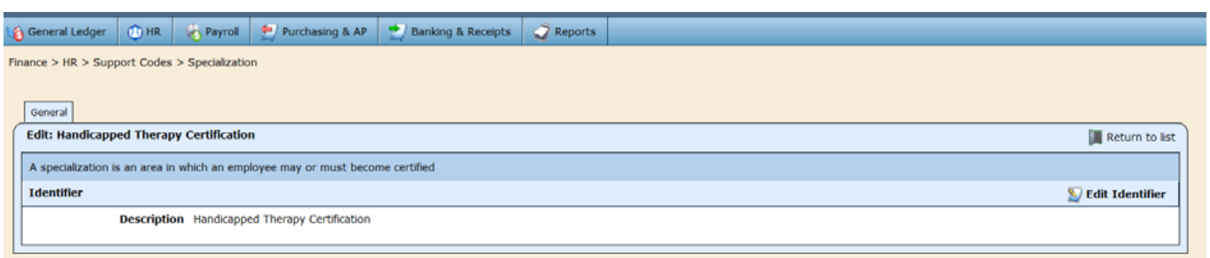


Enter description of specialization.

Click **Create**



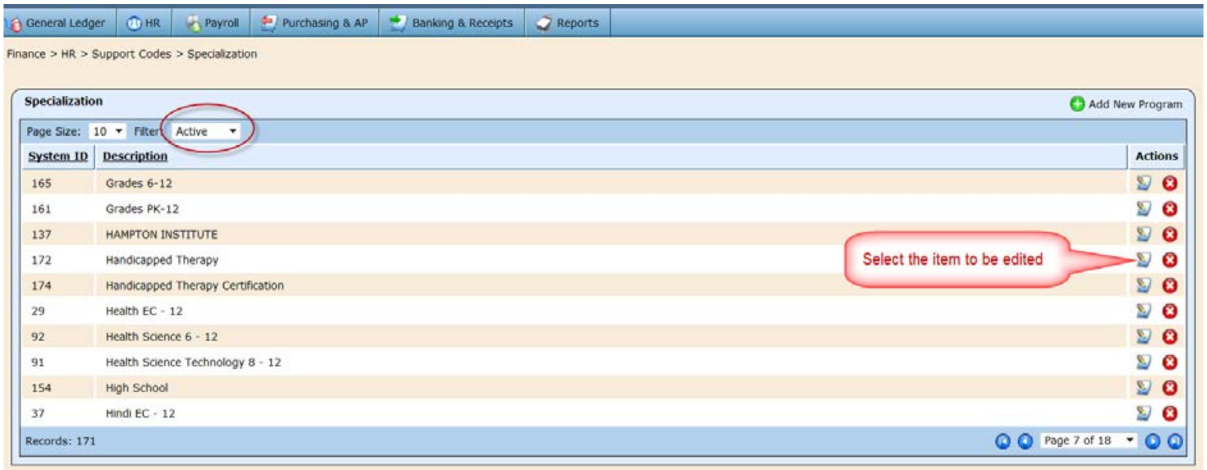
A summary screen will appear. Verify the information is correct.



Edit a Specialization

Finance *> HR > Support Codes > Specialization*

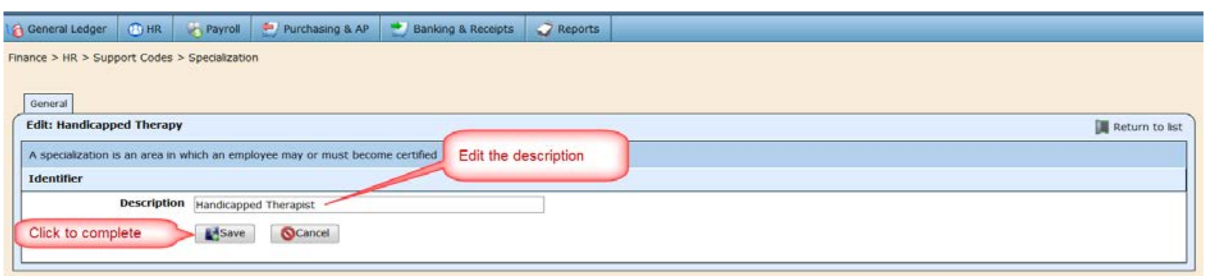
Click **Edit** next to the specialization that will be corrected.



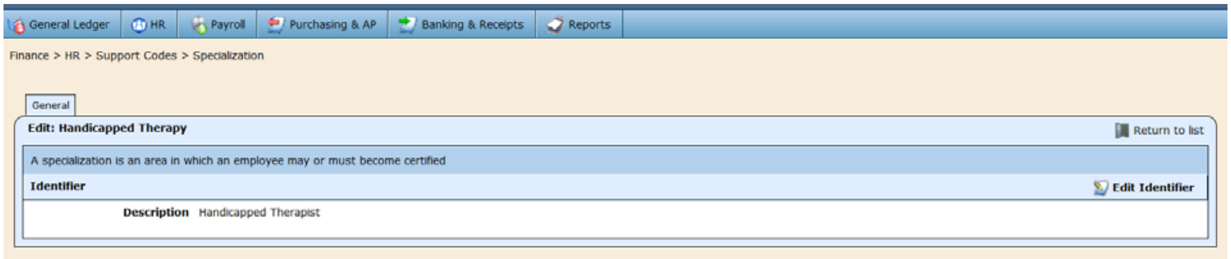
Click **Edit Identifier**

Correct the description.

Click **Save**



A summary screen will appear. Verify the information is correct. If it is not, return to Edit Identifier.

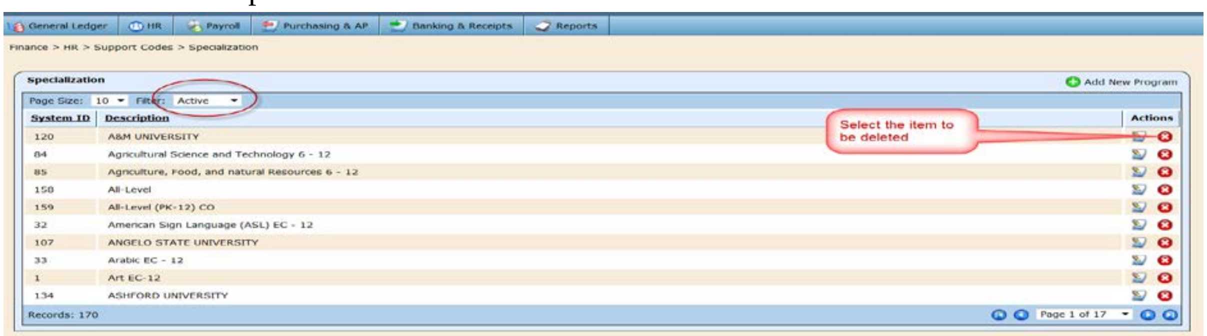


Delete a Specialization

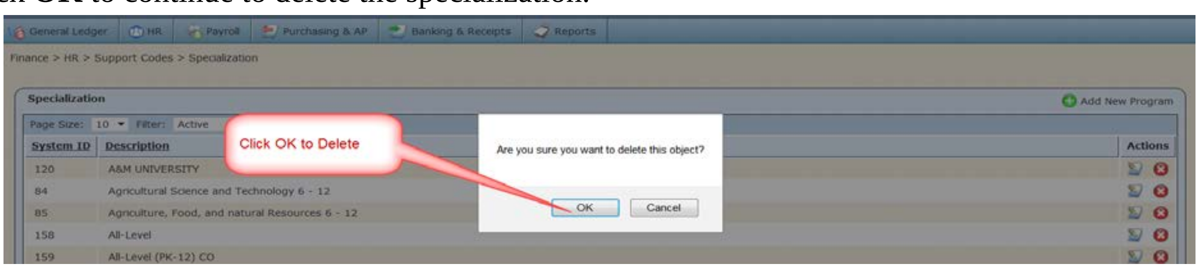
If a Specialization has never been used, it will be deleted permanently and cannot be restored and must be added as a New Specialization.

Finance *> HR > Support Codes > Degree Type*

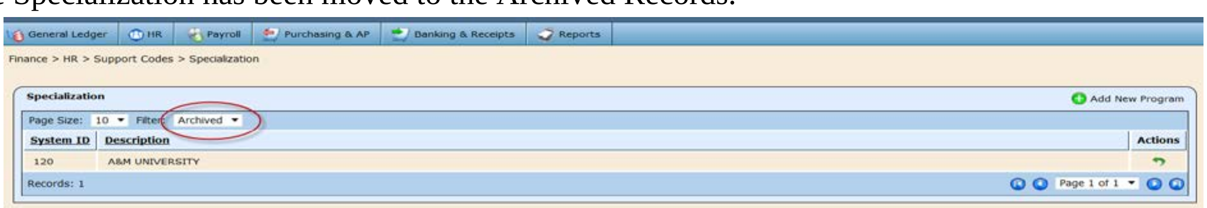
Click next to the specialization that will be deleted.



Click **OK** to continue to delete the specialization.



The Specialization has been moved to the Archived Records.



Restore a Specialization

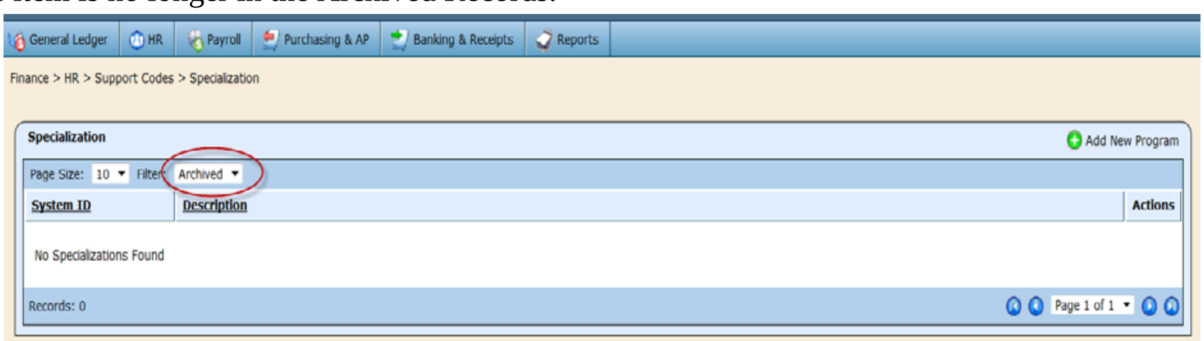
***Finance** > HR > Support Codes > Specialization*

Change to Archived Records

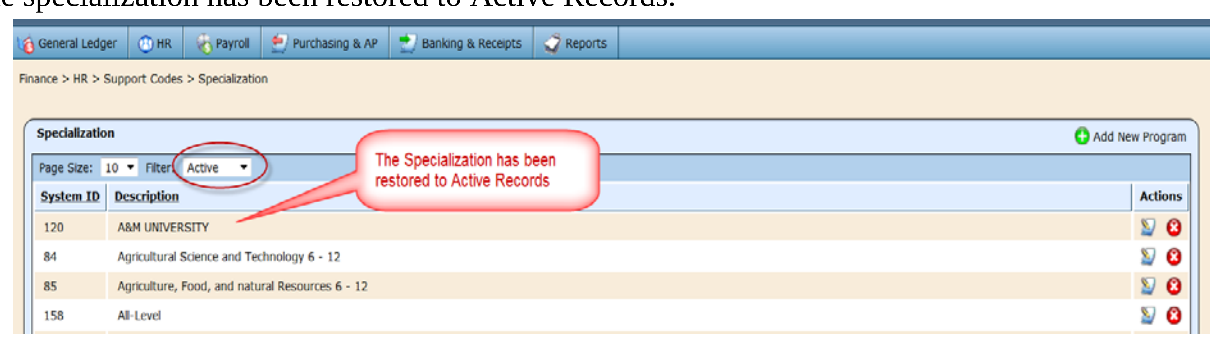
Click on  to restore the Specialization

Click OK to Confirm the Restore.

The item is no longer in the Archived Records.



The specialization has been restored to Active Records.



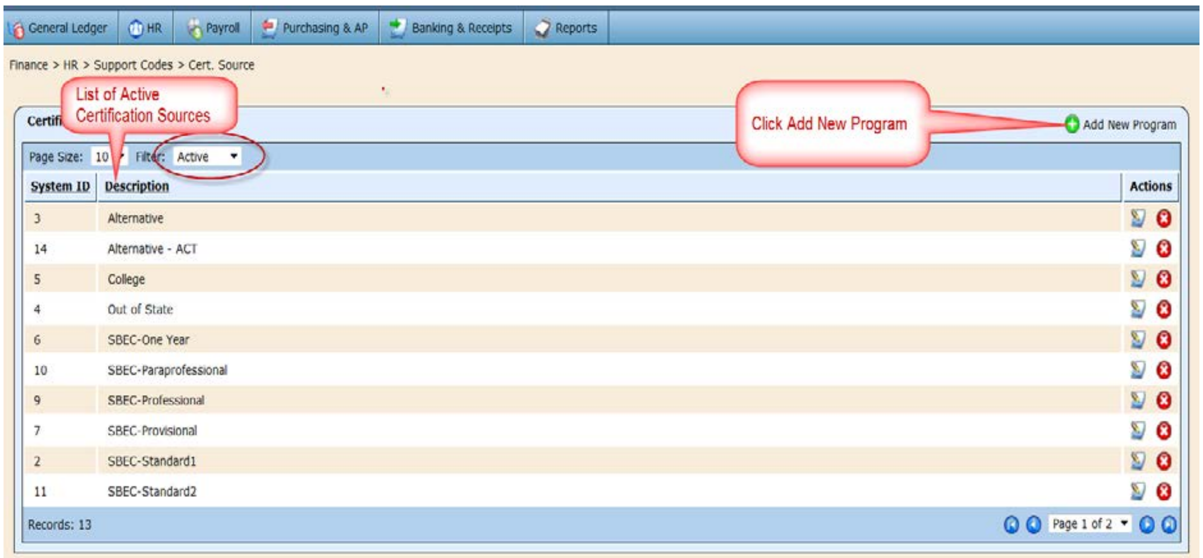
Certification Source

The certification source is the manner in which an employee can become certified.

Adding a Certification Source

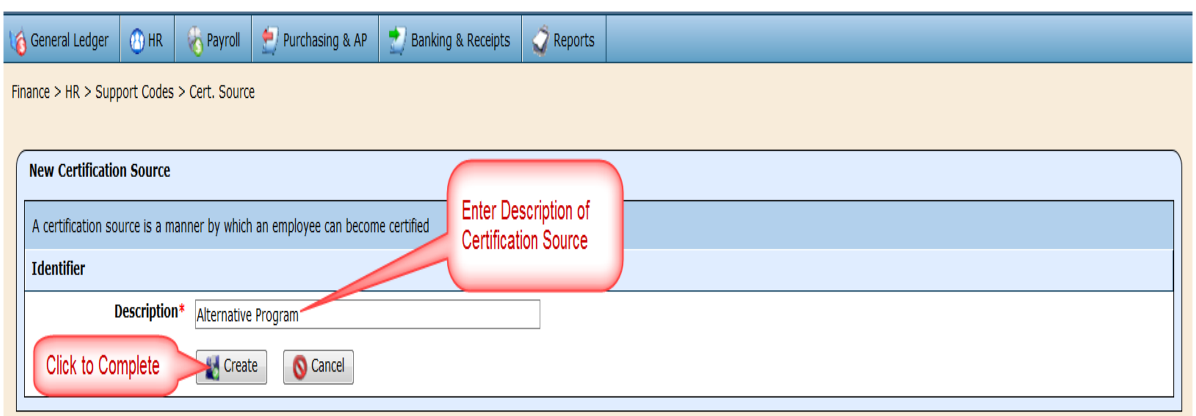
Finance *> HR > Support Codes > Cert. Source*

Click on **Add New Program**



Enter description, or name, of the Certification source.

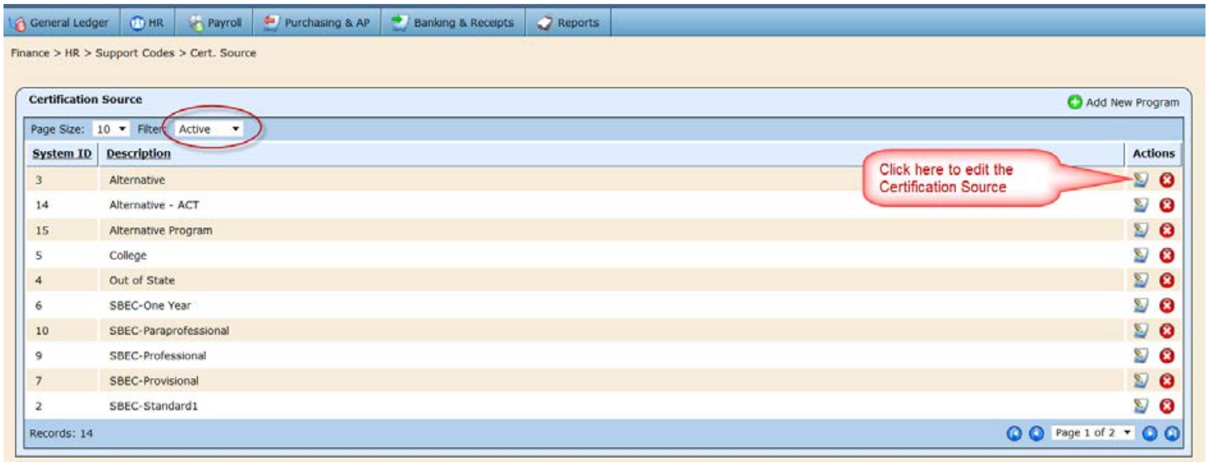
Click **Create**



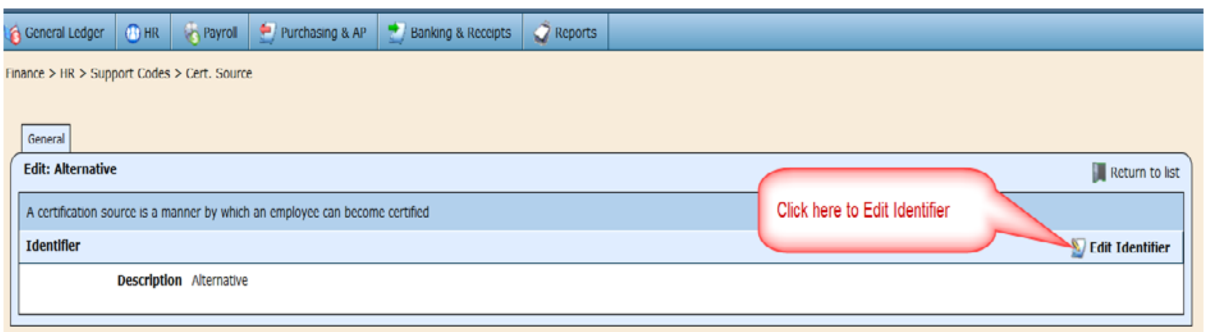
Edit a Certification Source

Finance *> HR > Support Codes > Cert. Source*

Click **Edit** next to the certification source that will be corrected.

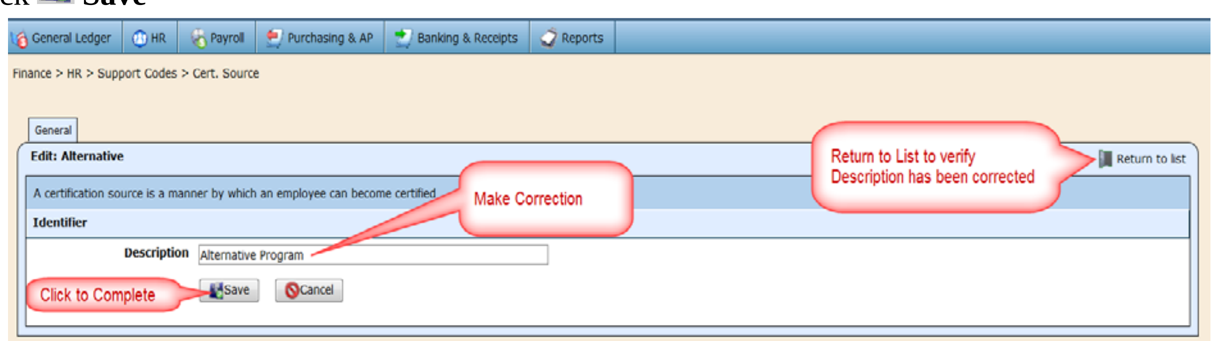


Click **Edit Identifier**



Correct the description field.

Click **Save**

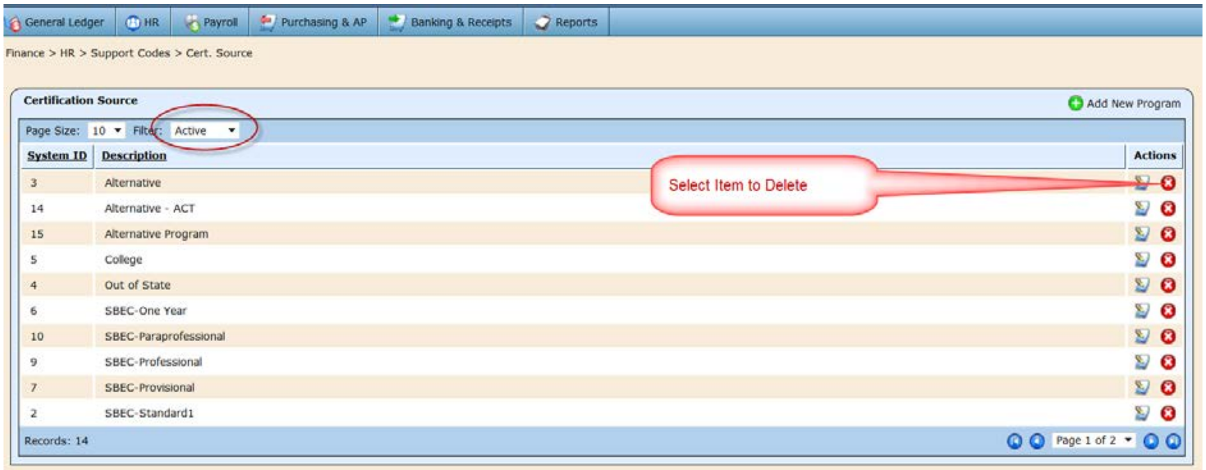


Return to List to verify the item has been corrected.

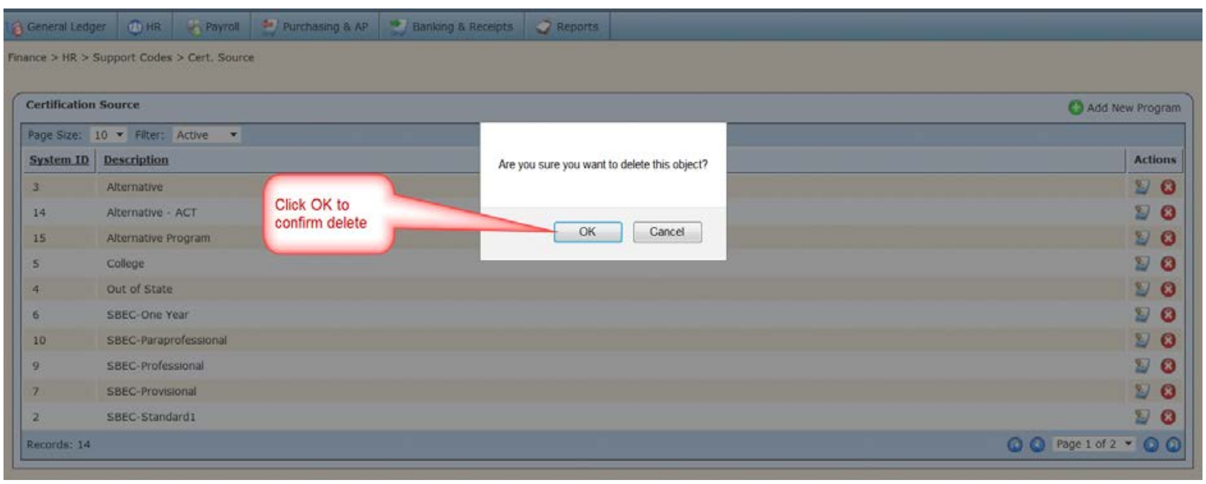
Delete a Certification Source

***Finance** > HR > Support Codes > Cert. Source*

Click **Delete** next to the certification source that will be deleted.



Click **OK** to continue to delete the certification source.

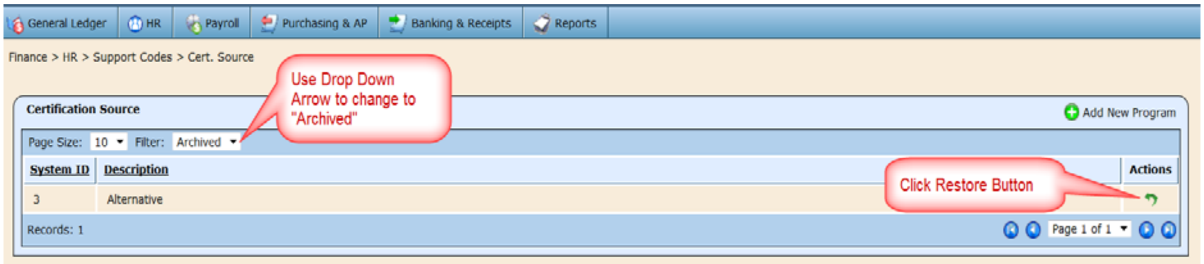


Restore a Certification Source

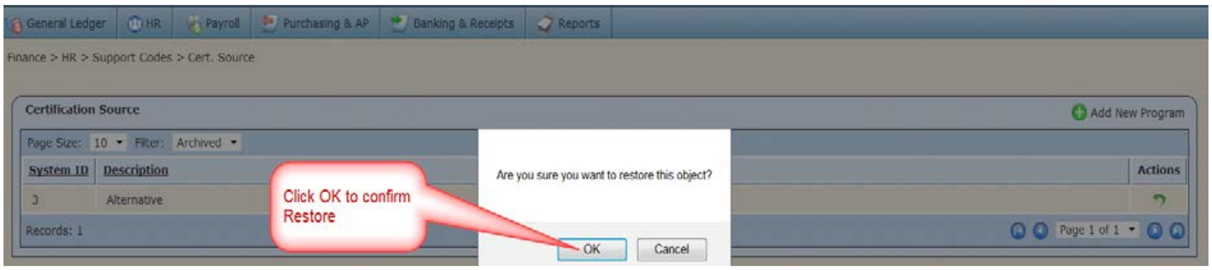
If the certification source has not been used and it is deleted, it is permanently deleted and would have to be added back through the "Add Certification Source" process.

If the certification source has been used, it will disable. It can be restored by filtering the certification source to archived from the drop down arrow.

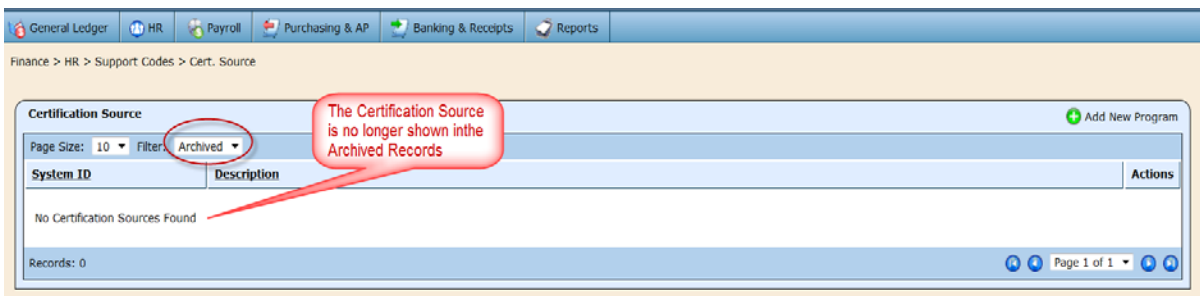
Click the to Restore the Certification Source



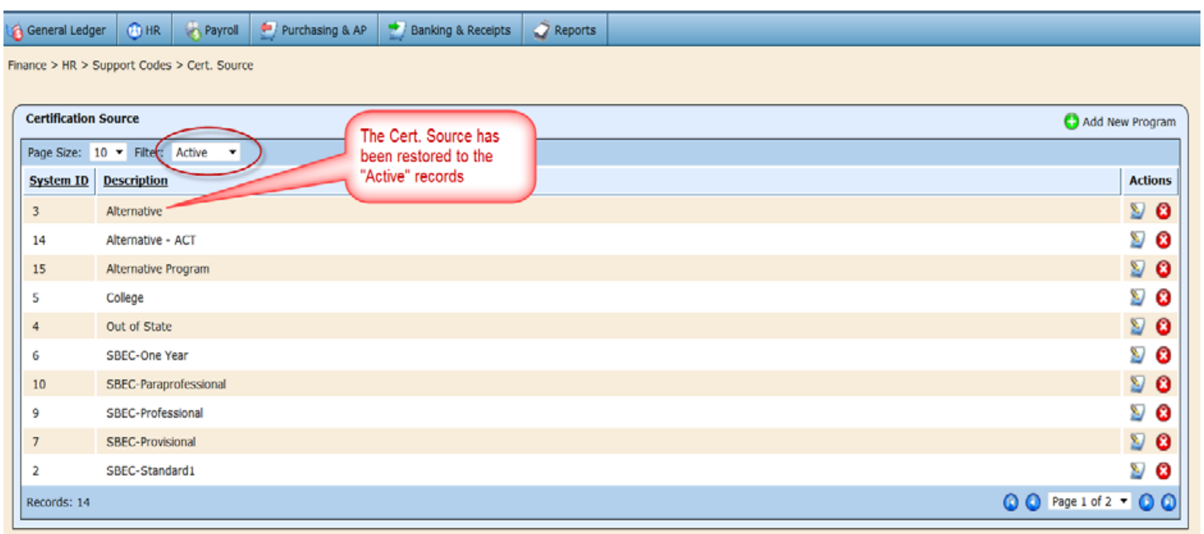
Click OK to confirm the Restore



The item has been removed from the Archived records.



The item has been restored to the "Active" records.



Background Checks

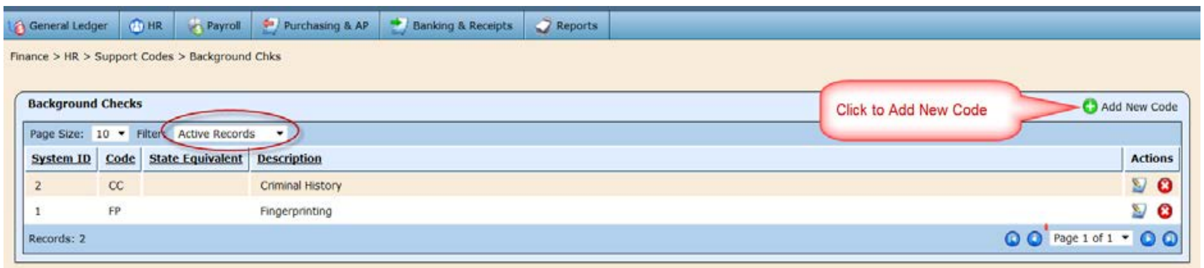
Background Checks is designed to maintain code tables for locally defined Background Checks for employees relative to new hiring screening and other checks.

The Background Check code tables are used in the HR screens for local use.

Adding a Background checks

Finance *> HR > Support Codes > Background Checks*

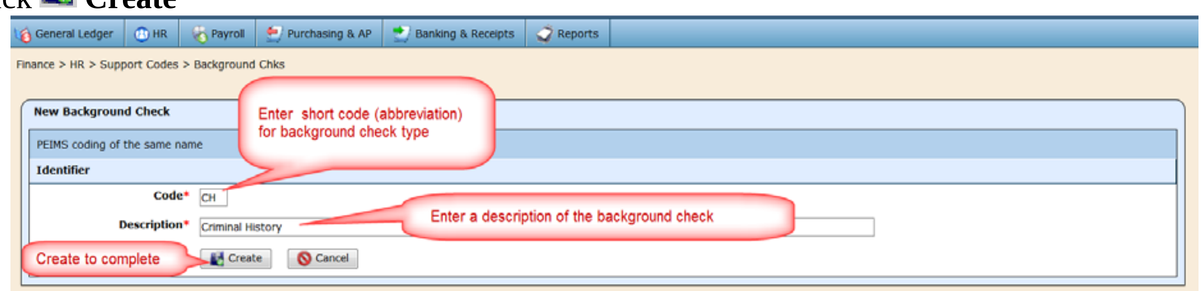
Click on **Add New Code**



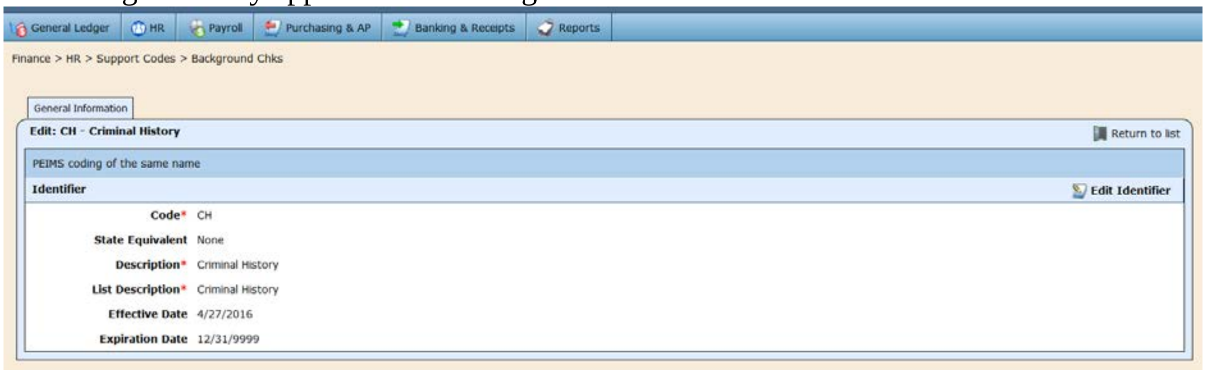
- **Code –** Enter a short code (abbreviation) for background check that is being added.
- **Description –** Enter a description of the background check.

Enter information in the fields.

Click **Create**



The following summary appears as the background check is created.

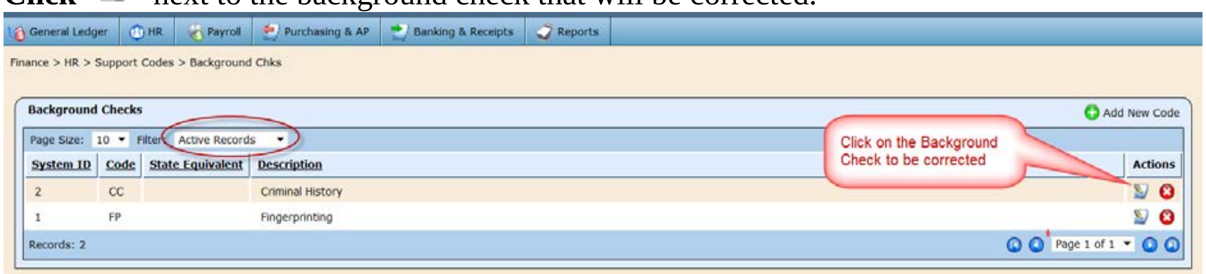


Note: The Effective Date and Expiration Date are self-populating but can be changed with the Edit feature.

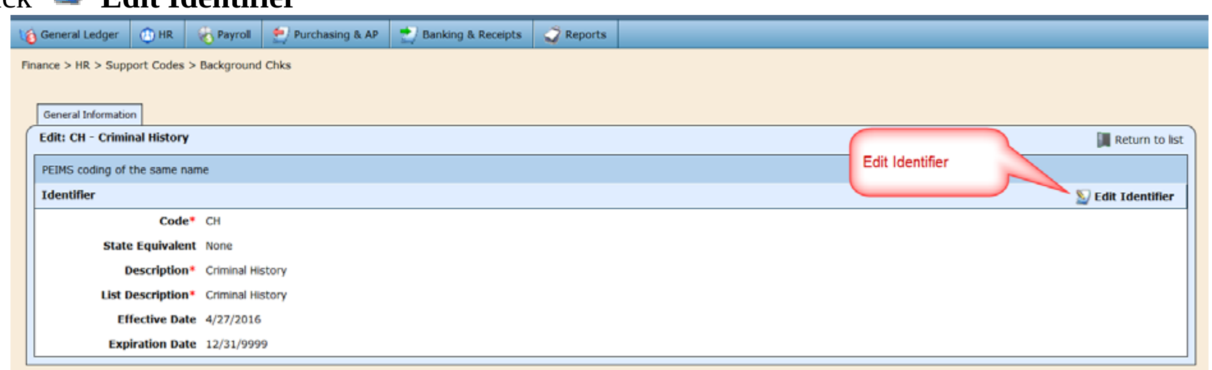
Edit a Background Check

Finance *> HR > Support Codes > Background Checks*

Click next to the background check that will be corrected.

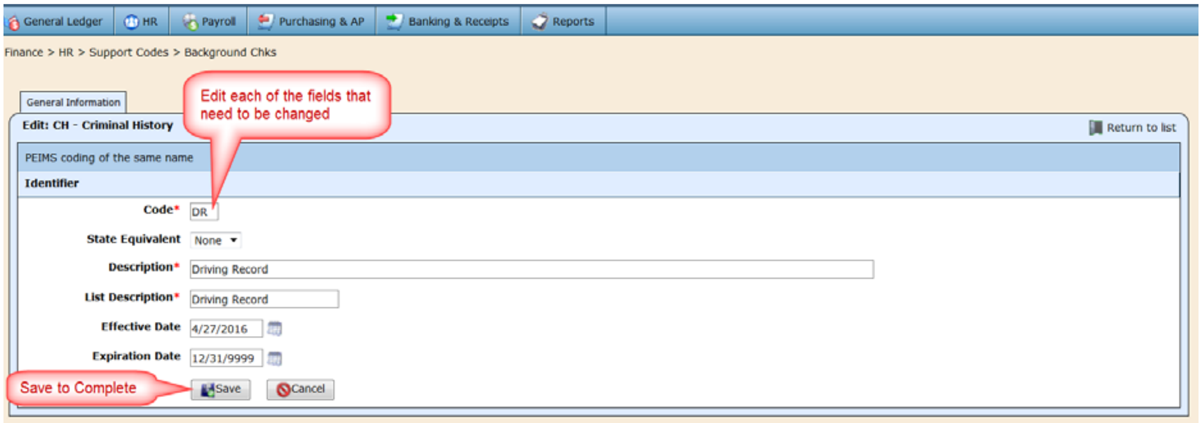


Click **Edit Identifier**

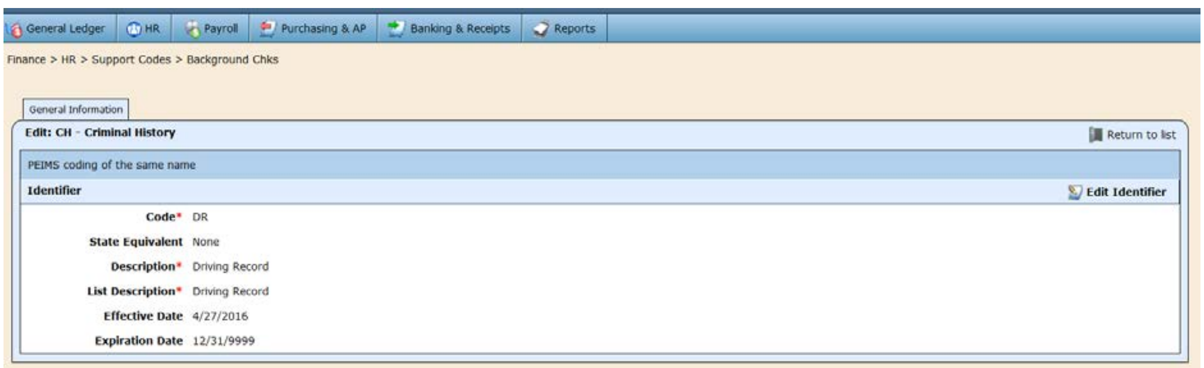


Correct the appropriate fileds.

Click **Save**

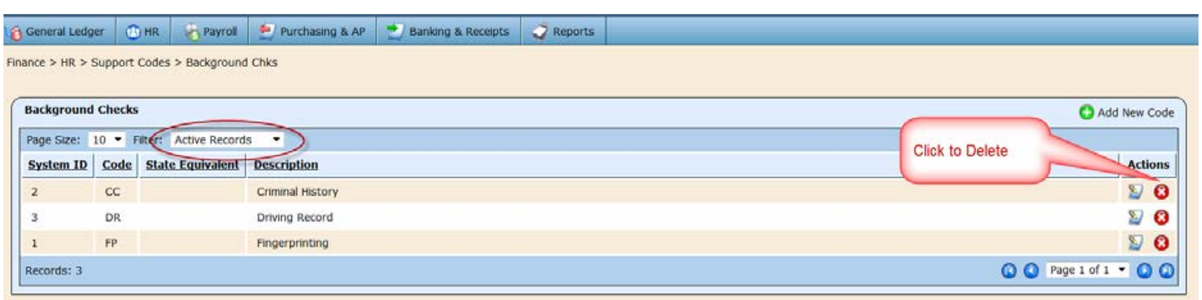


A summary screen will appear. Verify the information is correct. If not, Edit Identifier again to correct.

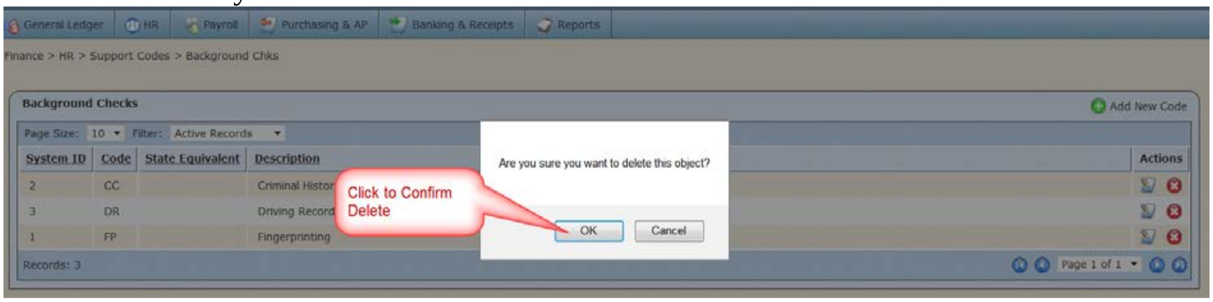


Delete a Background Check

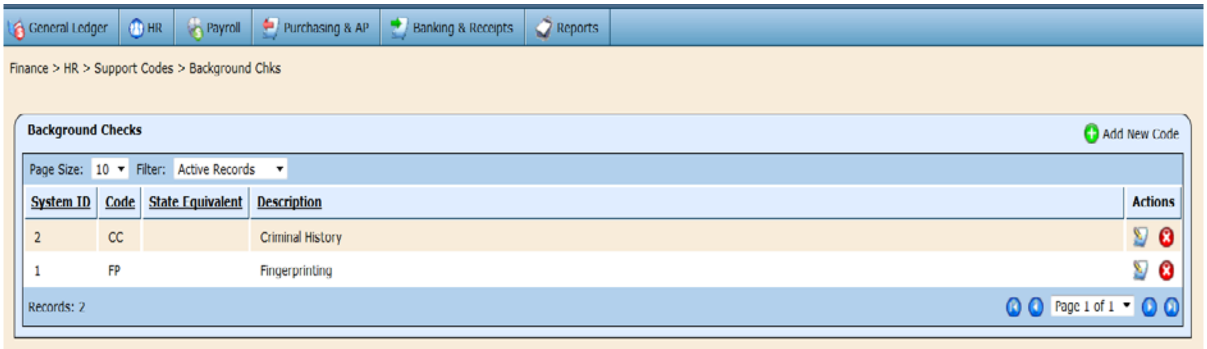
Finance *> HR > Support Codes > Background Checks*



Click **OK** to confirm you want to delete.



The item has been removed from Active Records



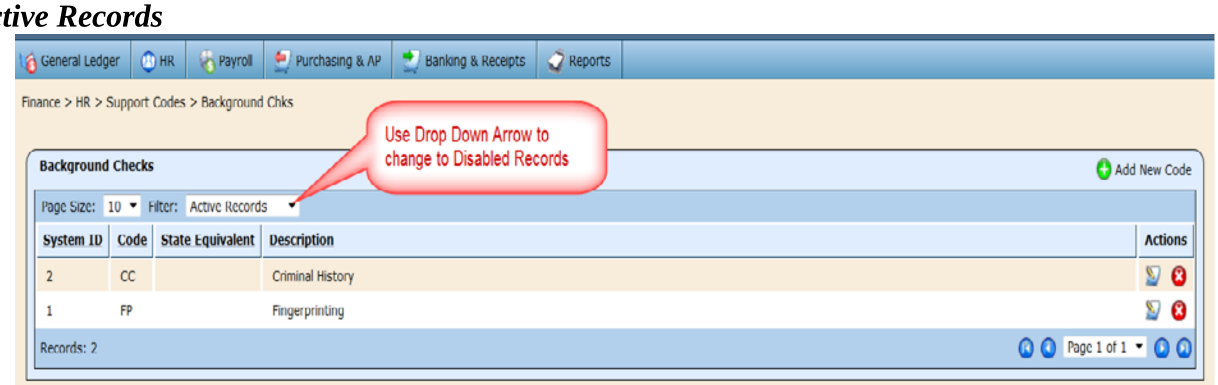
Restore a Deleted Background Check

If a background check has been deleted but never used or attached to an employee it will be permanently deleted.

If a background check has been used or attached to an employee then the deleted background check moves from the active records to disabled records. If this contract was deleted in error follow the following steps to restore the background check.

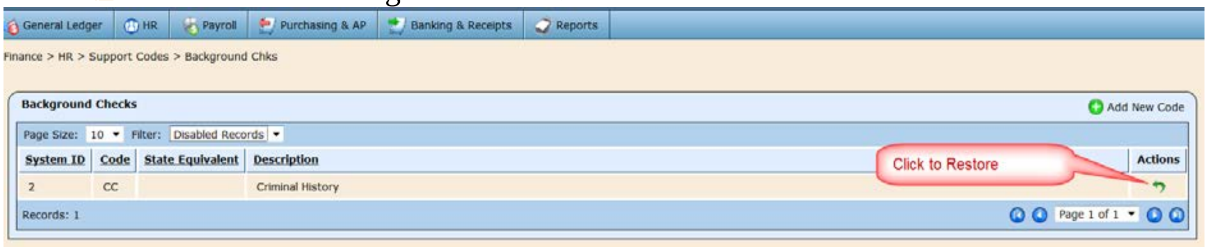
Finance *> HR > Support Codes > Background Checks*

Active Records

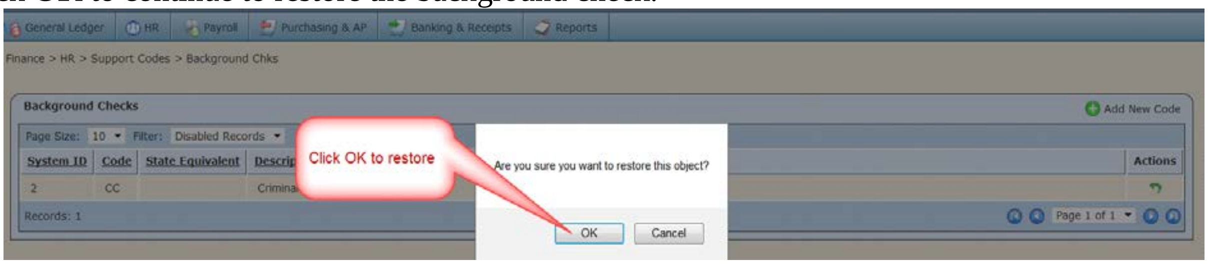


Disabled Records

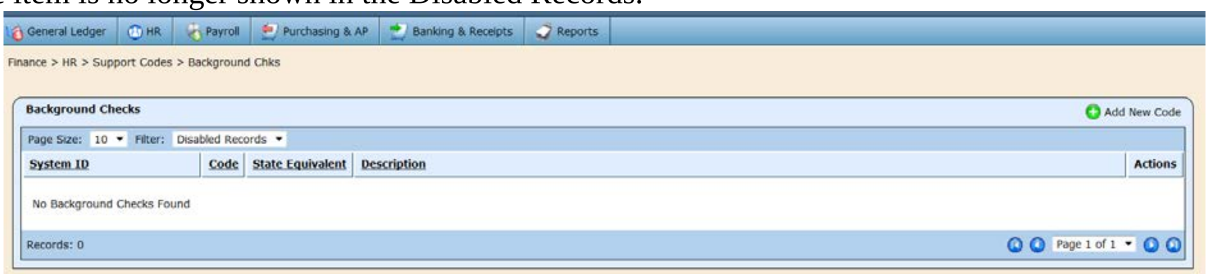
Click on to restore the background check.



Click **OK** to continue to restore the background check.



The item is no longer shown in the Disabled Records.



The item has been restored to Active Records.

Chapter 6
Frequently Asked Questions & Checklists

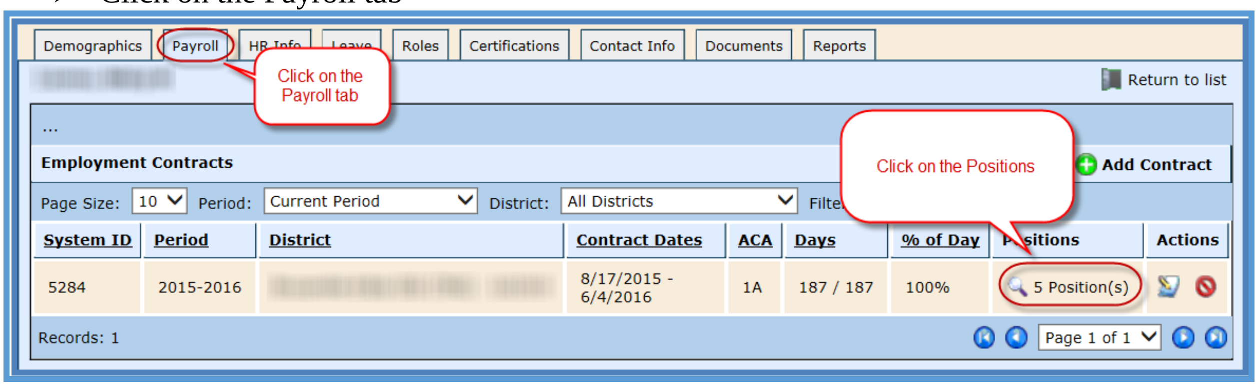
How to Use Multiple Funding Sources for one Position?

Employees who work on multiple activities or cost objectives are required to maintain monthly personal activity reports (PARs) to support the distribution of their salaries or wages.

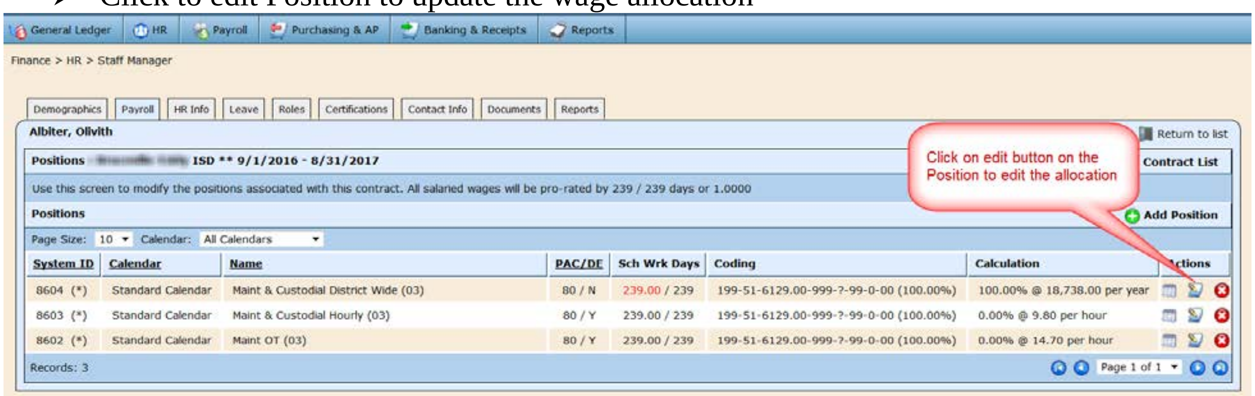
WebSmart has now simplified this process for you. The wage allocation can be updated on the employee's Position each payroll as needed without affecting the annual salary.

Finance *> HR > Staff Manager*

- ➢ Edit the employee
- ➢ Click on the Payroll tab

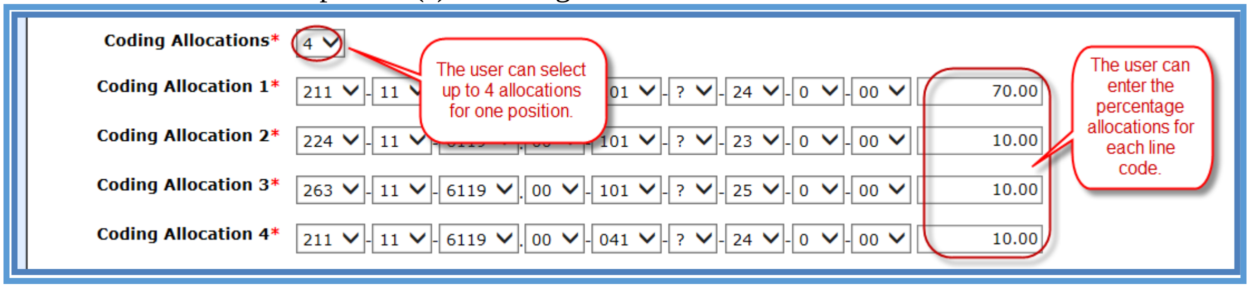


- ➢ Click to edit Position to update the wage allocation

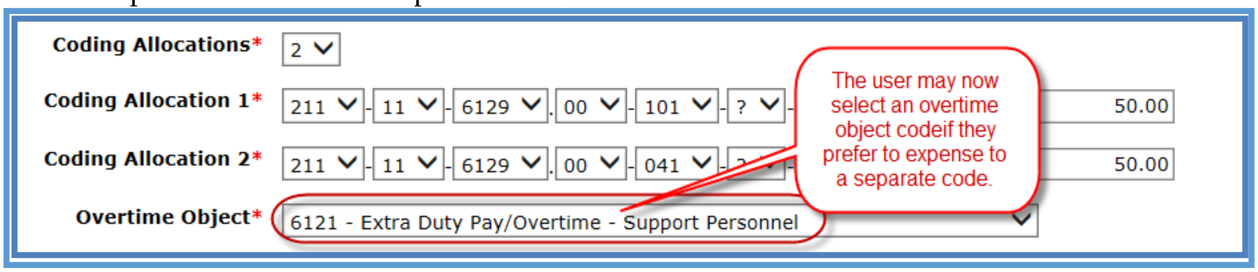


- ➢ **Coding Allocations** – This is a new field, which can be selected for updating the wage allocations for each pay period to update wage allocations for PAR's. The user may select up to 4 Coding Allocations to enter.
  - o Select the number of Coding Allocations

- Make any necessary adjustments to the account codes
- Enter the percent(s) to the right of the account code



➢ **Overtime Object** – The user may now select an overtime object code if they prefer to expense overtime to a separate code.

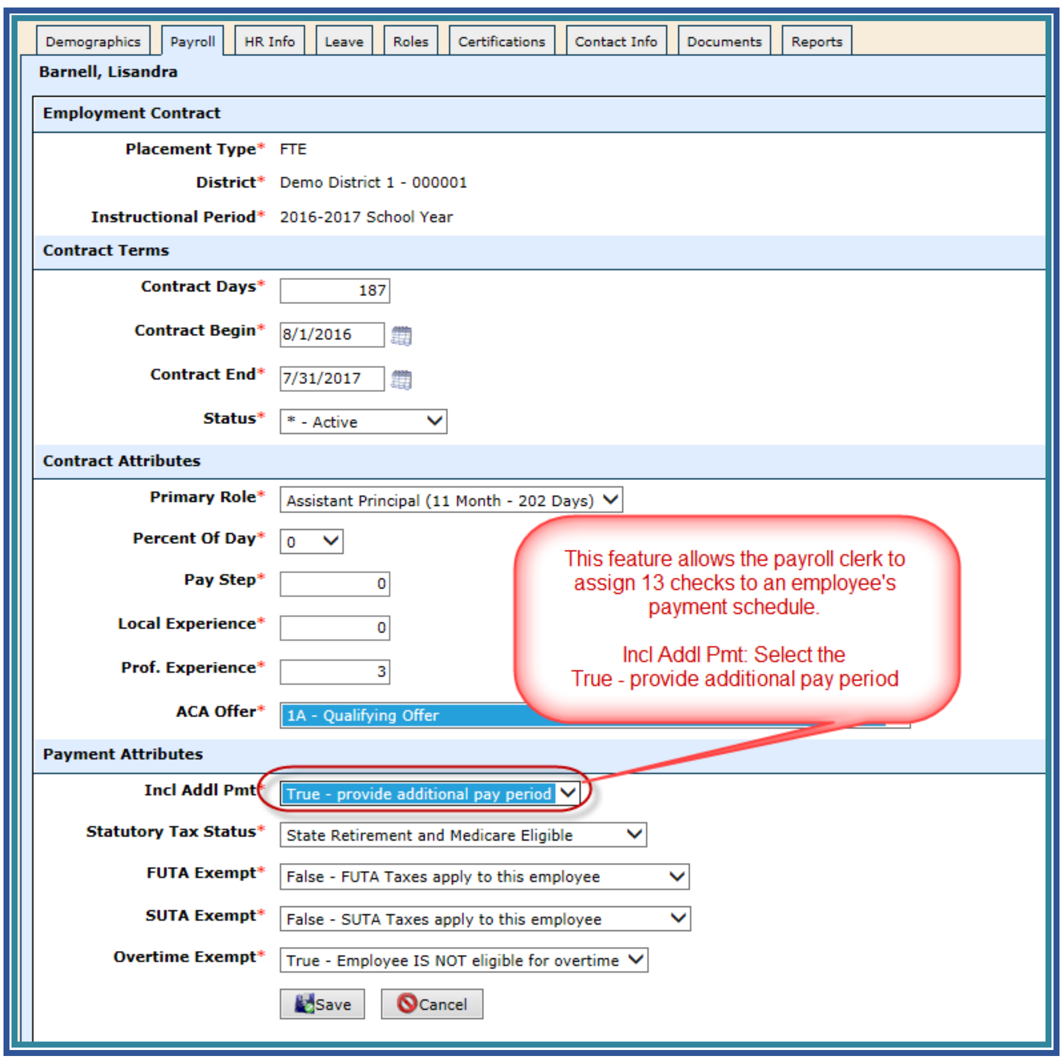


➢ Select **Save** – The allocated percentages will be reflected in the payroll journals. The employee's scheduled amount for payroll will remain constant unless the user makes a change.

Adding 13 Checks to an Employee's Payment Schedule

Finance *> HR > Staff Manager*

1. Go to ***Finance*** *> HR > Staff Manager*.
2. Enter or edit new employee.
3. Select the Payroll tab.
4. Select Add Contract for the New Year. In this example, we will use 2016-2017
5. Incl Addl Pmt – In this field, select True – provide additional pay period. This will add an additional check to the employee's payment schedule on their Position.
6. Select Save.



7. Select on the employee's Position where it indicates 3 Position(s)
8. Select Add Position.
9. Enter the employee's Position Details.

New Employee Set Up Checklist

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

https://oapi.trs.state.tx.us/TRAQS/do/loginPage

It is important to complete all of the New Employee Setup screens in the order listed below and as one process.

Following this check-list will ensure all required information is entered in the correct order.

____ STEP 1 – Demographic Information (***FINANCE*** > *HR* > *Staff Manager* > *Add/Find Staff.* When no match is found, *Create New Staff*; enter information and Create.

_____ STEP 2 – *Payroll* Tab – Enter all of the required information and then *Save*.

_____ STEP 3 - *HR Info* Tab – There are multiple sections that must be completed,

_____ General HR Attributes (primary facility, employment status, etc.)
_____ Federal Withholding Elections
_____ State Withholding Elections (Note: Texas has no State Withholdings)
_____ Payment Elections (direct deposit, live check, etc.)
_____ Background Checks (verification & results of background check)
_____ Leave Policy Elections (per employee's employment contract)
_____ Benefit Program Elections (insurance deductions, savings, etc.)
_____ Additional Allowance Elections (Healthcare Supplement/Refund Pre-Tax Deductions

_____ STEP 4 – *Leave* Tab – Enter the School Year, carry forward balances, etc.

_____ STEP 5 – *Roles* Tab -

_____ Teaching Campuses
_____ Responsibilities

_____ STEP 6 – *Certifications* Tab – Enter their Specialization and source for Certifications.

_____ STEP 7 – *Contact Info* Tab – Enter address, phone, e-mail and emergency contact(s)

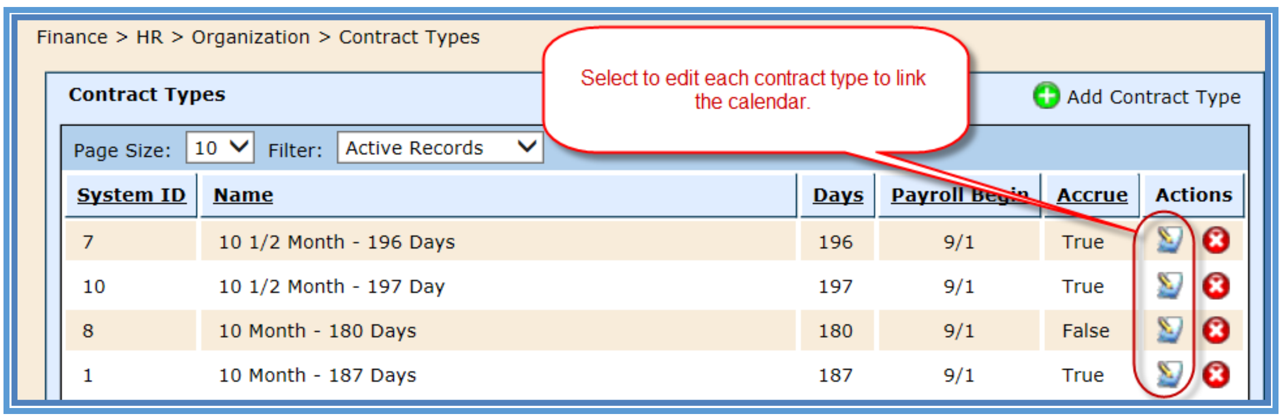
_____ STEP 8 – *Documents* Tab – Upload documentation relative to the employee

_____ STEP 9 – *Reports* Tab – this allows you to run reports. Not required for New Employee Setup.

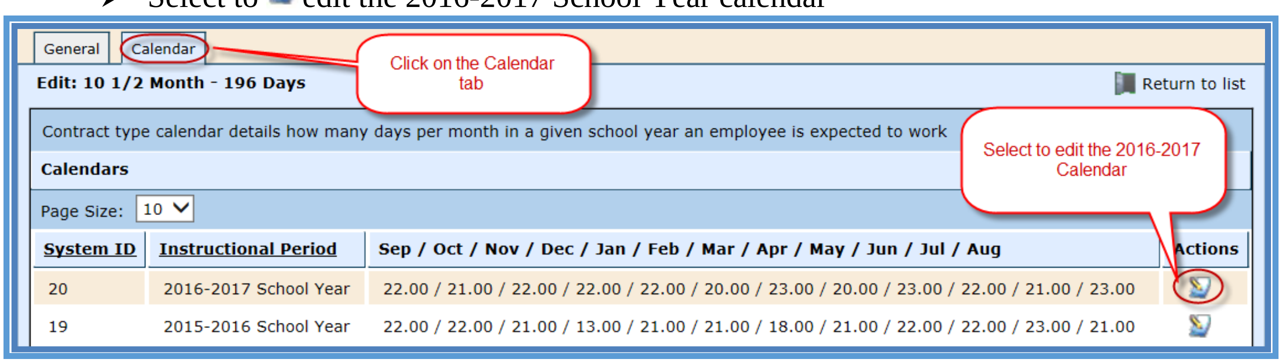
Create Calendars for 2016-2017 on the Contract Types

Contract Types must be linked to a calendar, which is indicated below, containing the # of days per month in a given school year the employees are expected to work for TRS reporting purposes.

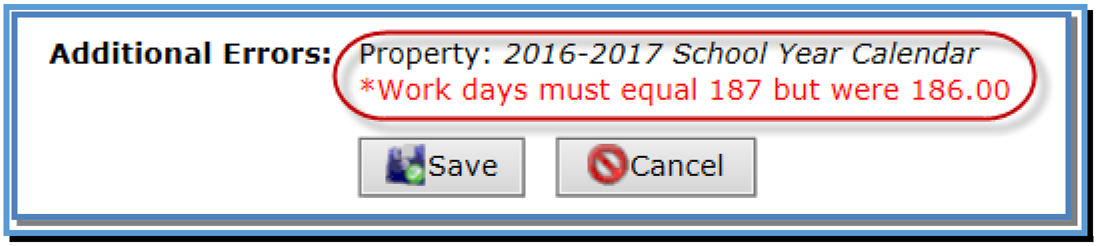
- Go to ***Finance*** > *HR* > *Organization* > *Contract Types*
- Select to edit each Contract Type



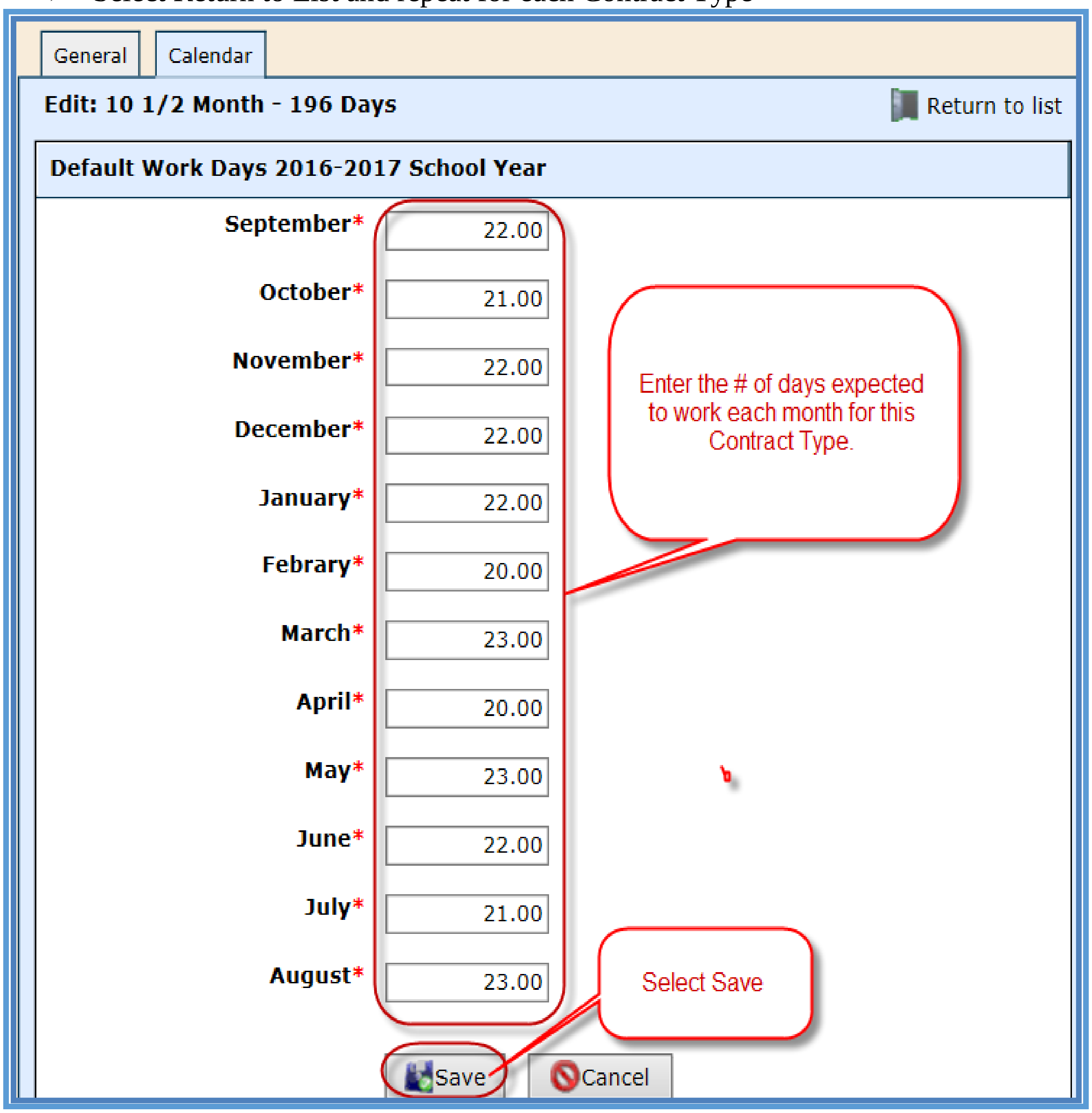
- Select the Calendar tab
- Select to edit the 2016-2017 School Year calendar



- Enter the number of days worked for each Month for this Contract Type
- Be sure the total number of days work equal the Contract Days. If the days do not match, the user will receive an error.



- Select Save
- Select Return to List and repeat for each Contract Type

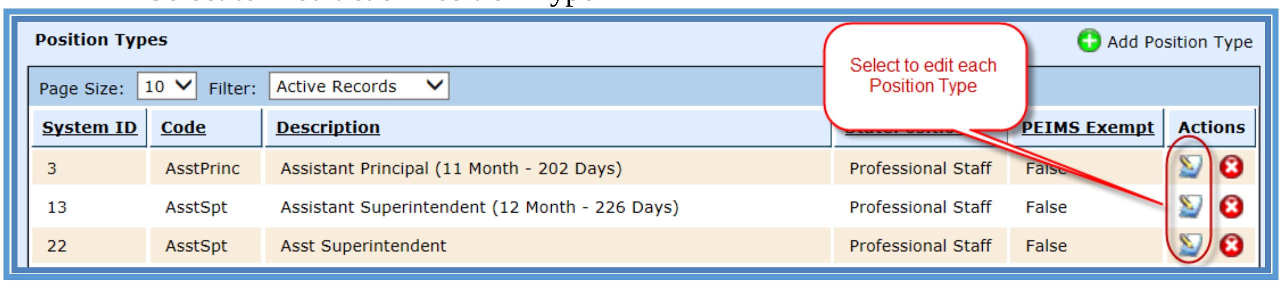


Enter Hours Per Day on the Position Types

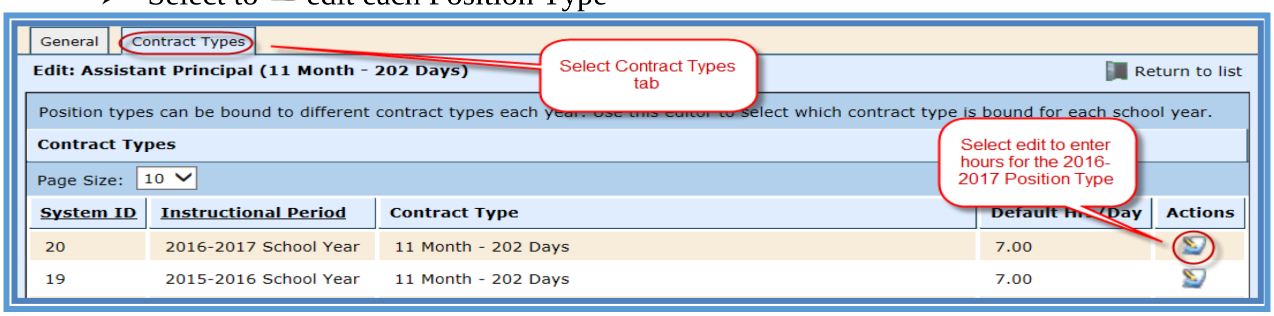
Position Types manage default hours per Contract Type for TRS reporting. There may be multiple Position Types set up in WebSmart based on the number percentage of Contract Days. For example, if your school, has 3 counselor positions, but they each have a different number of contract days, you may see something similar to this in the database:

a. Nurse/Counselor (10 ½ Month – 196 Days)
b. Nurse/Counselor (10 ½ Month – 197 Days)
c. Nurse/Counselor (10 ½ Month – 202 Days)

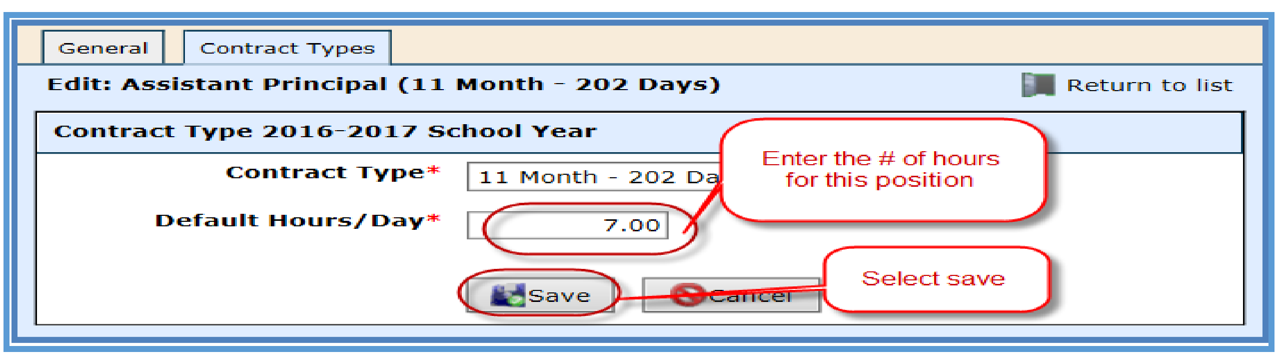
- Go to ***Finance*** > *HR* > *Organization* > *Position Types*
- Select to edit each Position Type



- Select the Contract Types tab
- Select to edit each Position Type



- Enter the number percent of hours per day the employee is scheduled to work
- Select Save
- Select Return to List and repeat for each Position Type



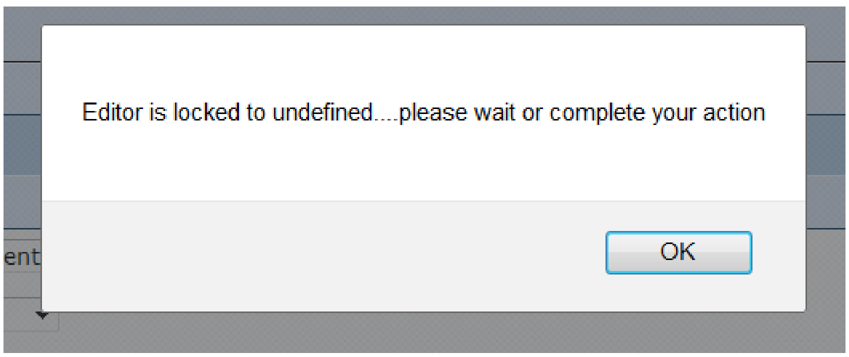
Error Codes

There are times an error code will pop up when you are trying to complete a process. Many of the codes will be self-explanatory and will tell you exactly what you need to correct the error. Other codes are not as detailed.

Below is a list of the codes that may occur.

Editor is Locked

Error: *Editor is locked to undefined…please wait or complete your action*



Action: Click OK and then either Save or Cancel the task you are working on to continue.

Chapter 7
Glossary of WebSmart Terms

ACA	Affordable Care Act.
Account Number	The employee's account number for direct deposit purposes.
Accrual Limit	Indicates the maximum amount a leave type can accrue.
Accrual Period	Indicates how a leave type will accrue, i.e., monthly, annually, etc.
Accrual Units	Indicates units of accrual such as hours, days, etc.
Accrue	Indicates if an item should, or should not, accrue a designated leave amount.
Active Only?	Criteria that will yield a results of active data only
Additional Rate	The amount or percentage requested on the employee's W-4.
Additional Withholding	The additional amount, if any, that the employee has requested be deducted from their payroll.
Allocation	The amount or percentage that is distributed among designated resources.
Allowance	Allowances are associated with Payroll and accounts for deductions associated with TRS and other designated benefits.
Allowances	The number of dependent allowances the employee has elected on their W-4 form.
Bank	The name of the employee's bank for payroll distribution purposes.
Benefit Program	A benefit program as any program to which an employee may elect that results in non-statutory deductions and/or contributions being applied to their paycheck.
Birthdate	Date of Birth to be entered as MM/DD/YYYY Format
Calculation Method	Determines if an item is to be a flat rate or a percentage amount.
Calendar	
Checking	Indicates the type of bank account the employee has elected to have payments deposited to.
Code	An abbreviation (up to 10 characters) that will print on the employee's service record.
Comments	Additional detailed information associated with an action or item.
Compensation Type	Indicates if the employee is paid a salary, hourly rate or daily rate.
Contract Begin	Indicates the first day the employee reported for work for the instructional period. This information is used for TRAQS reporting.
Contract Days	The number of days an employee will work.
Contract End	Indicates the last day the employee is required to report for work for the instructional

	period. This information is used for TRAQS Reporting.
Contract Month	The contract month a leave is being used.
Contract Type	Indicates the annual number of days/months the employee's contract contains.
Daily Increase	Indicates a flat amount of percentage of a daily rate of pay to be increased by. The increase will automatically be calculated and increased when the position is "promoted."
Degree Type	Indicates the highest degree the employee has received.
Demo Release	Designates if the employee has authorized or declined the release of their demographic information. This field defaults to "NOT authorized to release demographic information"
Display	Generates a summary of balances or a detailed list of pre-designated criteria
Distribution Type	Indicates the percentage of the employee's pay that is to be distributed in a particular way (i.e, part to savings, part to checking, etc.)
District	The school district the employee is associated with.
Driver's License	The Driver's License number of the employee.
Effective Date	The actual date an action becomes effective. Use the MM/DD/YYYY format.
Election Type	Indicates of the employee has elected to receive their pay via a live check or direct deposit.
Eligible for Rehire	When employment is terminated, this indicates if the employee is eligible to be rehired or not.
Employee	An individual who works for the district.
Employment Status	Indicates if the individual is employed full-time, part-time, substitute, etc.
Estimated Leave Balances	The forecasted amount of leave that an employee has available.
Ethnicity	Affiliation with a social group that has common national or cultural traditions.
Exempt From Dock	Indicates if the position is exempt from being docked for items such as Extra Duty or Stipend pay.
Expiration Date	The date an item expires. Use the MM/DD/YYYY format.
Export Data to Excel	Exports report criteria to into an Excel document.
Filing Status	Indicates which tax table the employee has elected (i.e., single, married, etc.)
FUTA	Federal Unemployment Taxes
Gender	Male or Female
Highly Qualified	Indicates if an employee is highly qualified based on the HQ requirements.
Hourly Increase	Indicates a flat amount or percentage of a current salary that is to be increased. The increased amount will automatically be calculated when the position is "promoted."
Instructional Period	Designates the instructional school year (i.e., 2016-2017).

Leave Policy	Specific details and criteria for an employee's leave accruals and/or distributions.
Local Experience	The number of years of experience the employee has had *at the district.*
Local ID	This field is the State VID, which is the information obtained from the TSDS.
Mask SSN	Criteria that is designed to not display, or otherwise, hide an employee's Social Security Number.
Name	Name can either be the person's name and may include fields for their first, middle and last name. Name can also identify an action.
Non-Prorated Value	Indicates a flat amount that an employee is paid for something such as a stipend.
Notification	Indicates if the employee has requested to receive their check stub via e-mail.
Offering	Associated with Benefit Plans with the appropriate employee deductions and employer contributions.
Original Hire Date	The actual hire date of the employee. Use MM/DD/YYYY format.
Overtime Exempt	Indicates if the employee is or is not eligible for overtime pay.
Pay Step	Indicates the pay grade step of the employee. This information may not be applicable to all employees such as "substitutes".
Paychecks	Identifies how many paychecks will be issued for the instructional period.
Payroll Activity Code	This code is determined by the PEIMS Code Table.
Payroll Begin	Identifies the month and day that the contract should begin during an instructional period.
Payroll Calendar	Indicates how often the employee is paid, i.e., weekly, biweekly, monthly)
PEIMS Exempt	Identifies if a position is exempt or not exempt from PEIMS reporting.
Percent of Day	Indicates the percent of the day that the employee is working for the district.
Placement Type	Designates instructional staff positions that are to be reported to PEIMS.
Position Type	Indicates what type of position the employee holds, such as substitute, administration, etc.
Preferred Name	Name the individual prefers to be called (i.e., "Johnathan" may prefer to be called "John"
Primary Facility	The location where the individual is primarily assigned to work (i.e., elementary school, middle-high, high school, etc.)
Primary Role	Indicates the employee's primary job position. This information is used for TRAQS member data reporting.
Primary Source	The source that an employee obtained their specialized skills or certifications from.
Process on or after	The date a leave is to be processed on payroll.
Professional Experience	The number of years of experience the employee has had in all school districts. This information can be obtained from prior service records.
Promote Position	Moves the job position information forward to the next instructional period. You may

	elect not to promote pay items such as a stipend, extra duty or extracurricular positions.
Race	Refers to a person's biological physical characteristics such as White, Hispanic, Afro American, Native American, Asian, etc.
Rate	Denotes an amount or percentage.
Rate	Indicates if an amount is a flat rate or a percentage of something.
Reports	Provides the ability to generate a report that contains pre-determined criteria.
Retirement Date	The retirement date of the employee, if applicable. Use MM/DD/YYYY format.
Salary Increase	Indicates the flat rate or percentage of salary that has been approved. The increased amount will automatically be calculated and added to the current salary when a position is "promoted"
Specialization	Lists any certifications or special skills the employee holds or is qualified to teach.
SSN/State ID	Social Security Number or the State ID number that is assigned to the individual.
State Position	A job position that is approved by the State.
Status	Indicates the employment status such as full-time, retired, etc.
Statutory Tax Status	Determines what taxes should be withheld from the employee's pay, such as Social Security, Fica, Medicare, etc.
Straight Time Mask	Indicates the payroll code as determined by the FASRG.
SUTA	State Unemployment Taxes
Timeclock ID	This feature works with Time Clock Plus Software.
To Expire a Certification	Provides a means by which to designate that an employee's current certifications have expired.
TRS Class	A designated classification that is mandated by TRS (Teacher Retirement Classification)
Units Accrued	Identifies the amount of leave that is accrued for vacation, sick leave, personal leave, etc. on a monthly or annual basis.
Units Adjusted	Generally associated with Leave Balances and is the method where Leave balances can be adjusted.
Units Used	Determines how much leave is deducted or added to an employee's leave balance.
WC Category	The Workman's Comp category for the employee's position.