

*Finance
Business
Software*

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.

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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>

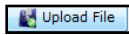
- ✓ Once you begin the new employee set up, it is important to complete the process as one action to ensure everything is entered in the proper sequence to avoid potential error messages.
- ✓ At the beginning of each section, you will be given the path (shown in *italics*) that will guide you to the 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...

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

 Upload File

Upload File – saves the file to WebSmart



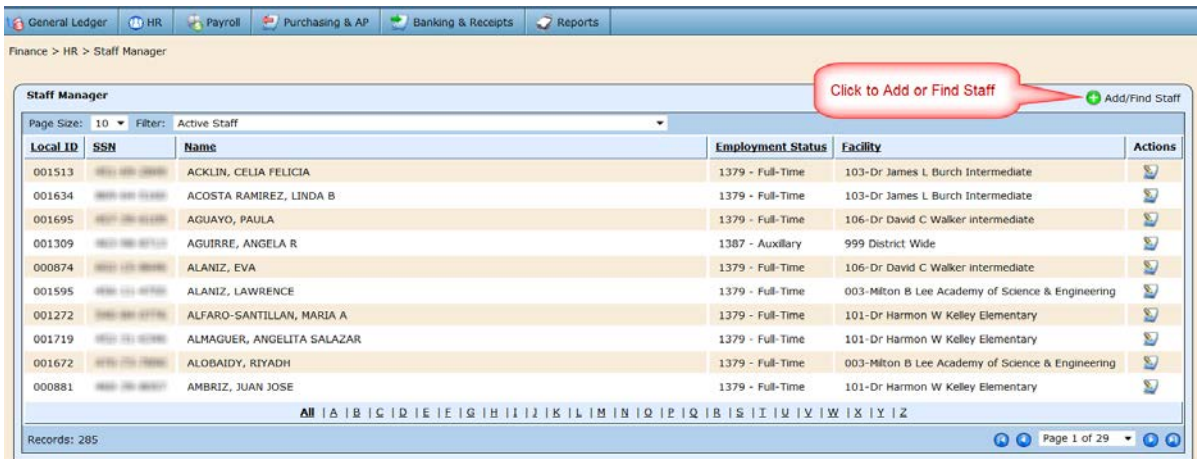
Run Report – begins running the requested report

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**



Staff Manager

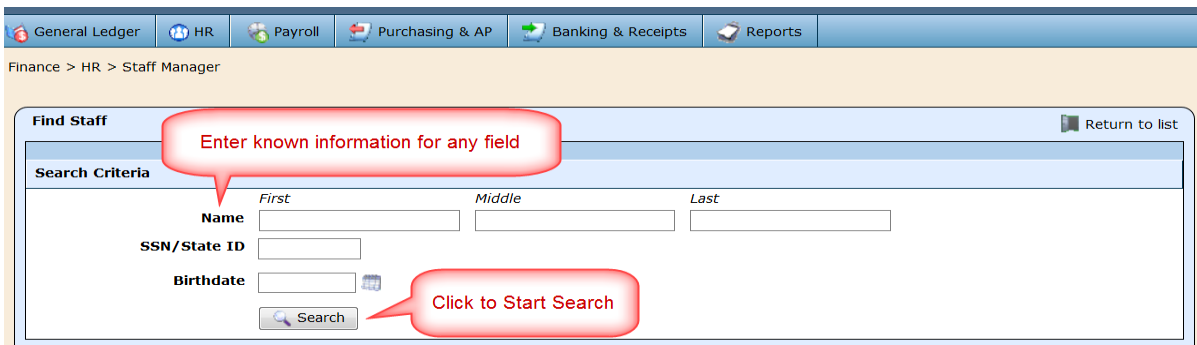
Page Size: 10 Filters: Active Staff

Local ID	SSN	Name	Employment Status	Facility	Actions
001513	0000-000-00000	ACKLIN, CELIA FELICIA	1379 - Full-Time	103-Dr James L Burch Intermediate	
001634	0000-000-00000	ACOSTA RAMIREZ, LINDA B	1379 - Full-Time	103-Dr James L Burch Intermediate	
001695	0000-000-00000	AQUAYO, PAULA	1379 - Full-Time	106-Dr David C Walker intermediate	
001309	0000-000-00000	AGUIRRE, ANGELA R	1387 - Auxiliary	999 District Wide	
000874	0000-000-00000	ALANIZ, EVA	1379 - Full-Time	106-Dr David C Walker intermediate	
001595	0000-000-00000	ALANIZ, LAWRENCE	1379 - Full-Time	003-Milton B Lee Academy of Science & Engineering	
001272	0000-000-00000	ALFARO-SANTILLAN, MARIA A	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	
001719	0000-000-00000	ALMAGUER, ANGELITA SALAZAR	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	
001672	0000-000-00000	ALOBALDIY, RIYADH	1379 - Full-Time	003-Milton B Lee Academy of Science & Engineering	
000881	0000-000-00000	AMBRIZ, JUAN JOSE	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	

Records: 285 Page 1 of 29

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

Click  **Search**



Find Staff

Enter known information for any field


Search Criteria

First Middle Last

Name

SSN/State ID

Birthdate


 Search

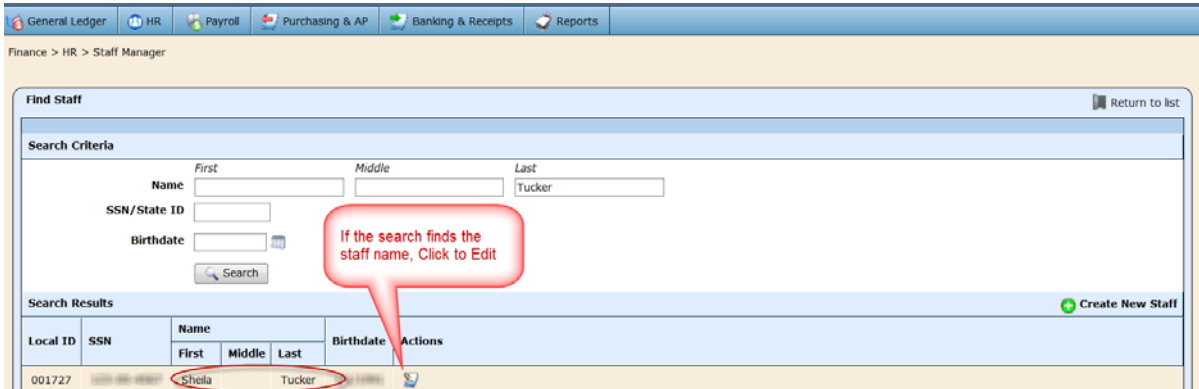
Click to Start Search

Return to list


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

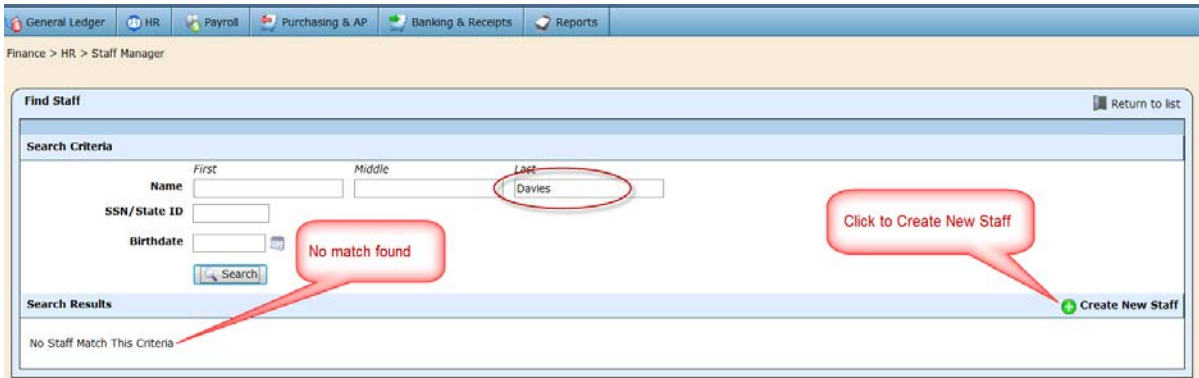
If their name appears, as shown below, they are currently in the system.

Click  to edit their information.



The screenshot shows the 'Find Staff' interface. The 'Search Criteria' section has 'Name' fields for First, Middle, and Last. The 'Last' field contains 'Tucker'. Below the search criteria is a 'Search' button. The 'Search Results' section shows a table with columns: Local ID, SSN, Name (First, Middle, Last), Birthdate, and Actions. A single row is displayed with Local ID '001727', SSN, Name 'Sheila Tucker', and Birthdate. A red callout bubble points to the 'Name' column with the text 'If the search finds the staff name, Click to Edit'. A '+ Create New Staff' button is visible in the top right of the search results area.

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



The screenshot shows the 'Find Staff' interface. The 'Search Criteria' section has 'Name' fields for First, Middle, and Last. The 'Last' field contains 'Davies'. Below the search criteria is a 'Search' button. The 'Search Results' section displays the message 'No Staff Match This Criteria'. A red callout bubble points to this message with the text 'No match found'. Another red callout bubble points to the '+ Create New Staff' button with the text 'Click to Create New Staff'.


Chapter 2 Staff Manager

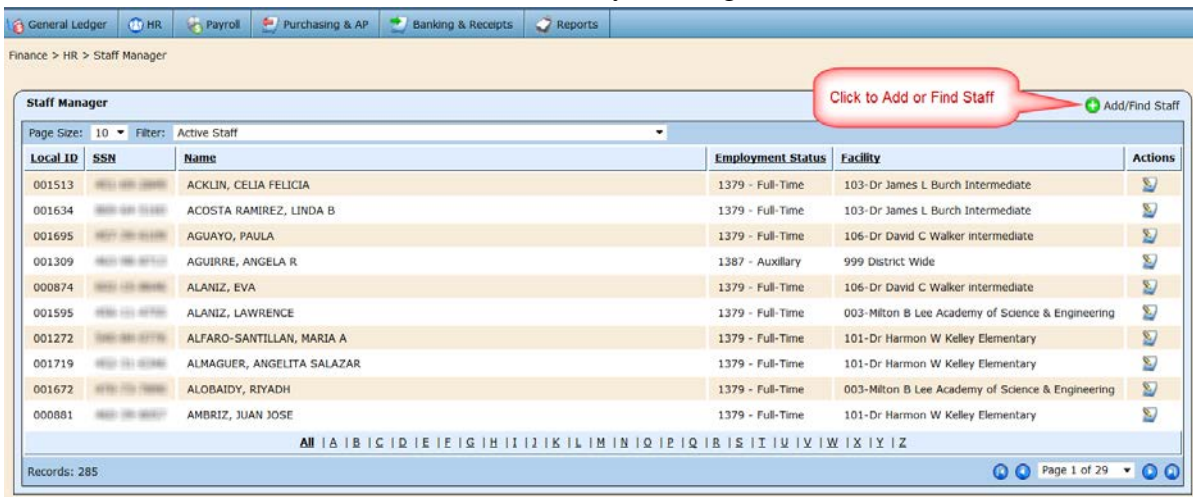
Step 1 - Demographics

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**



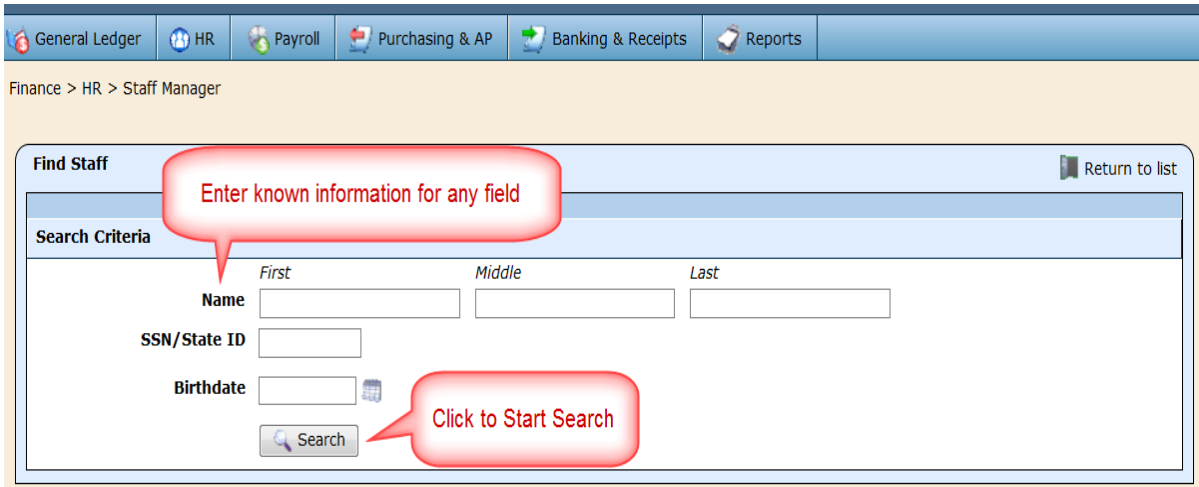
The screenshot shows the Staff Manager interface. At the top, there are navigation tabs for General Ledger, HR, Payroll, Purchasing & AP, Banking & Receipts, and Reports. Below the tabs, the breadcrumb path is Finance > HR > Staff Manager. The main content area is titled 'Staff Manager' and contains a table of active staff. A red callout box points to the 'Add/Find Staff' button in the top right corner of the table area.

Local ID	SSN	Name	Employment Status	Facility	Actions
001513	4811-001-20040	ACKLIN, CELIA FELICIA	1379 - Full-Time	103-Dr James L Burch Intermediate	
001634	8800-000-51100	ACOSTA RAMIREZ, LINDA B	1379 - Full-Time	103-Dr James L Burch Intermediate	
001695	4817-000-01100	AGUAYO, PAULA	1379 - Full-Time	106-Dr David C Walker Intermediate	
001309	4810-000-07110	AGUIRRE, ANGELA R	1387 - Auxiliary	999 District Wide	
000874	4800-110-00000	ALANIZ, EVA	1379 - Full-Time	106-Dr David C Walker Intermediate	
001595	4800-110-07100	ALANIZ, LAWRENCE	1379 - Full-Time	003-Milton B Lee Academy of Science & Engineering	
001272	5900-000-01110	ALFARO-SANTILLAN, MARIA A	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	
001719	4810-110-01000	ALMAGUER, ANGELITA SALAZAR	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	
001672	4710-110-20000	ALOBAIDY, RIYADH	1379 - Full-Time	003-Milton B Lee Academy of Science & Engineering	
000881	4800-000-00100	AMBRIZ, JUAN JOSE	1379 - Full-Time	101-Dr Harmon W Kelley Elementary	

Records: 285 Page 1 of 29

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

Click  **Search**




Find Staff Return to list

Search Criteria

First Middle Last

Name

SSN/State ID


Birthdate 

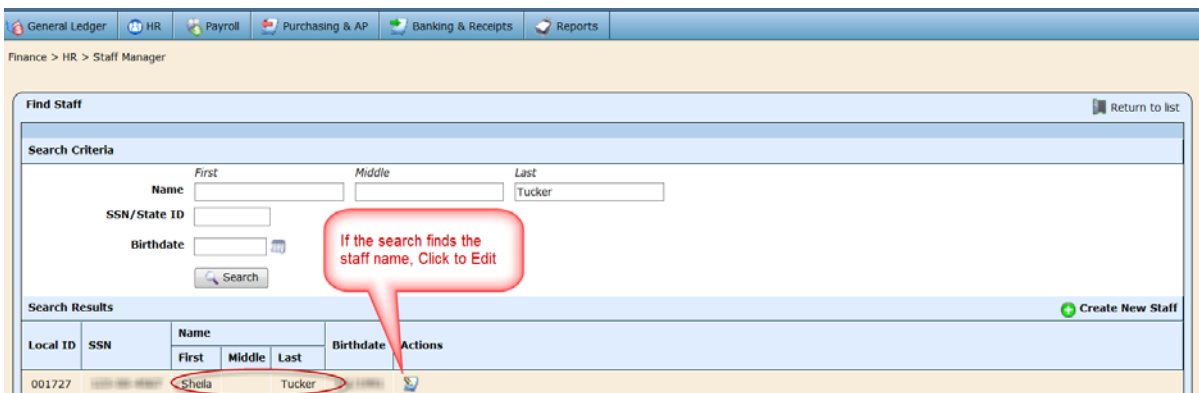
Enter known information for any field

Click to Start 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.




Find Staff Return to list

Search Criteria


First Middle Last

Name


SSN/State ID

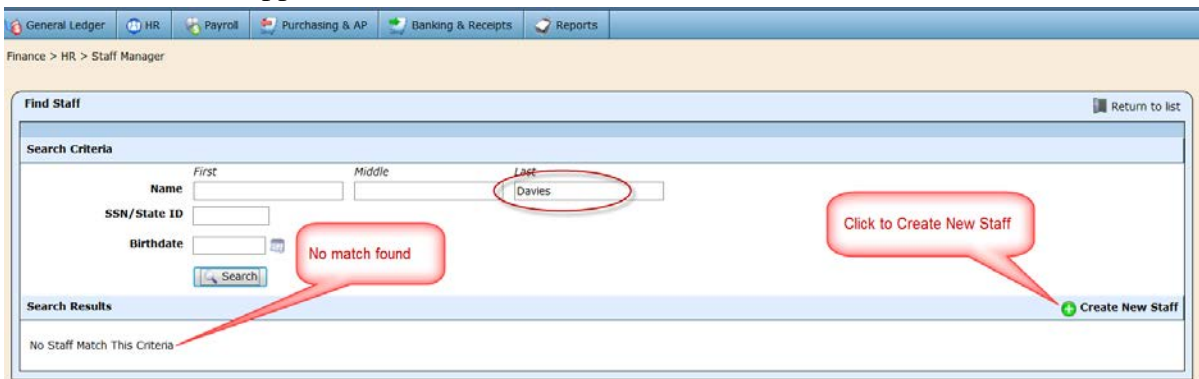
Birthdate 

Search Results + Create New Staff

Local ID	SSN	Name			Birthdate	Actions
		First	Middle	Last		
001727		Shoila		Tucker		

If the search finds the staff name, Click to Edit

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




Find Staff Return to list

Search Criteria

First Middle Last

Name

SSN/State ID

Birthdate 


Search Results + Create New Staff

No Staff Match This Criteria

No match found

Click to Create New Staff

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

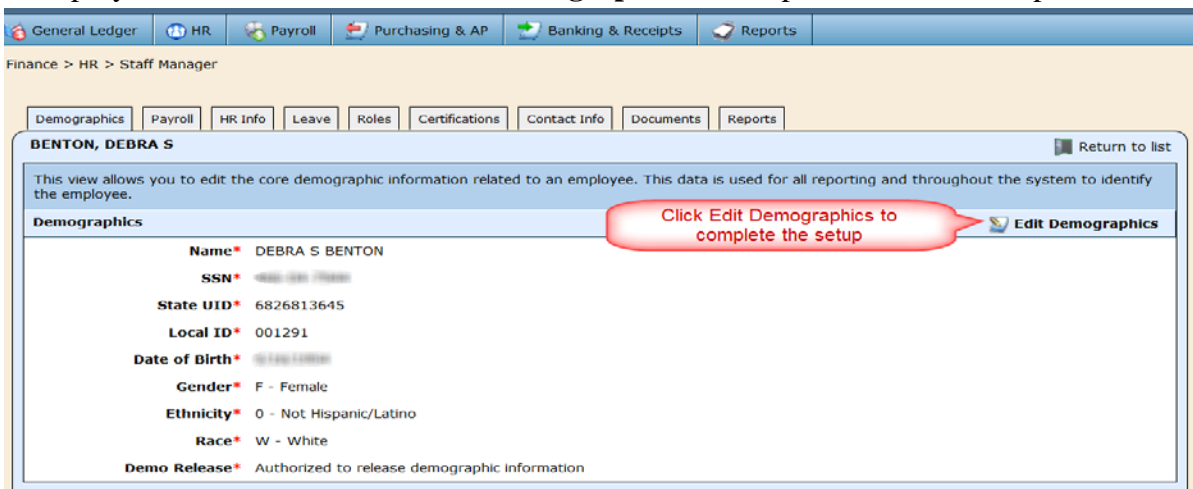
Select  **Create** after entering the information in all of the fields.

**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 all applicable boxes for **Race**. At least one box must be checked, multiple boxes are permitted.
- **Employment Status** – Select the employment status of the employee from the drop down 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.




General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

BENTON, DEBRA S Return to list

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

Demographics Click Edit Demographics to complete the setup  **Edit Demographics**

Name* DEBRA S BENTON

SSN*

State UID* 6826813645

Local ID* 001291

Date of Birth*

Gender* F - Female

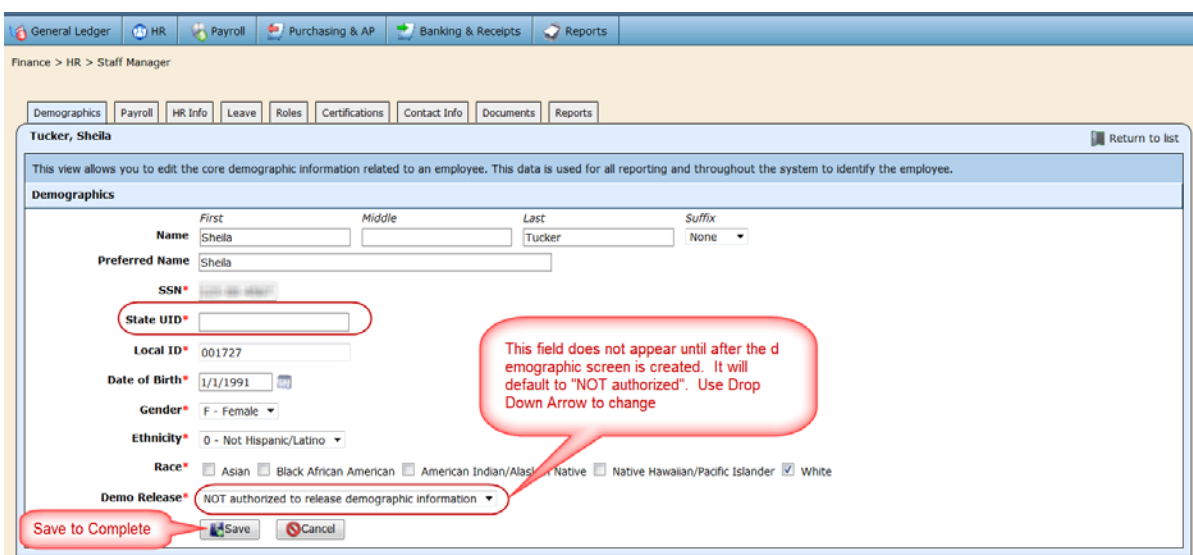
Ethnicity* 0 - Not Hispanic/Latino

Race* W - White

Demo Release* Authorized to release demographic information

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

Select  **Save**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

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

Demographics

Name First Middle Last Suffix

Preferred Name

SSN*

State UID*

Local ID* 001727

Date of Birth* 1/1/1991

Gender* F - Female

Ethnicity* 0 - Not Hispanic/Latino

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

Demo Release* NOT authorized to release demographic information

Save to Complete

This field does not appear until after the demographic screen is created. It will default to "NOT authorized". Use Drop Down Arrow to change

- **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

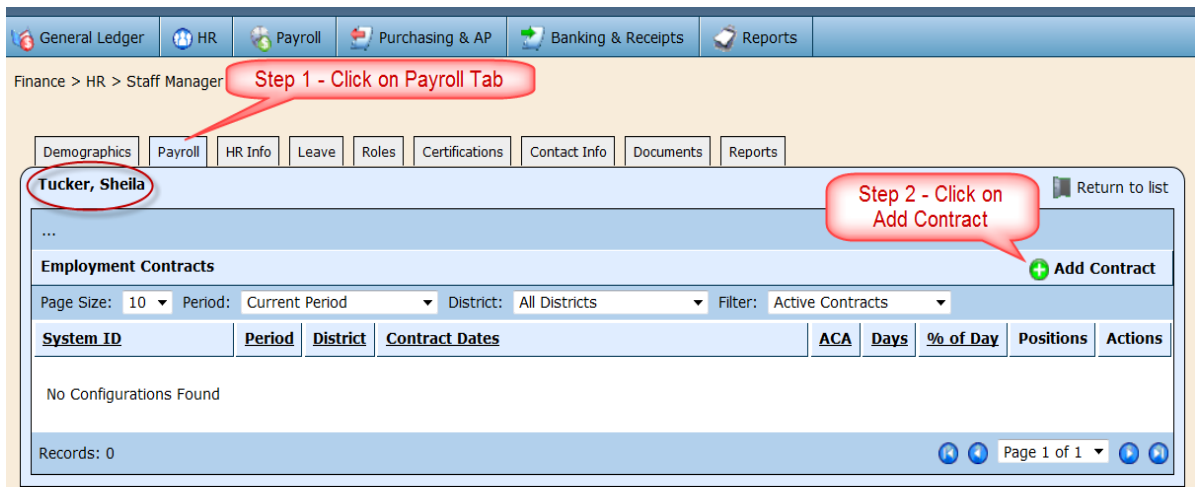
The contract section contains service record and contract information used in payroll processing and printing of service records. All employees must have a contract to be included in the payroll process. The contract replaces the Service Record from the previous WebSmart version.

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

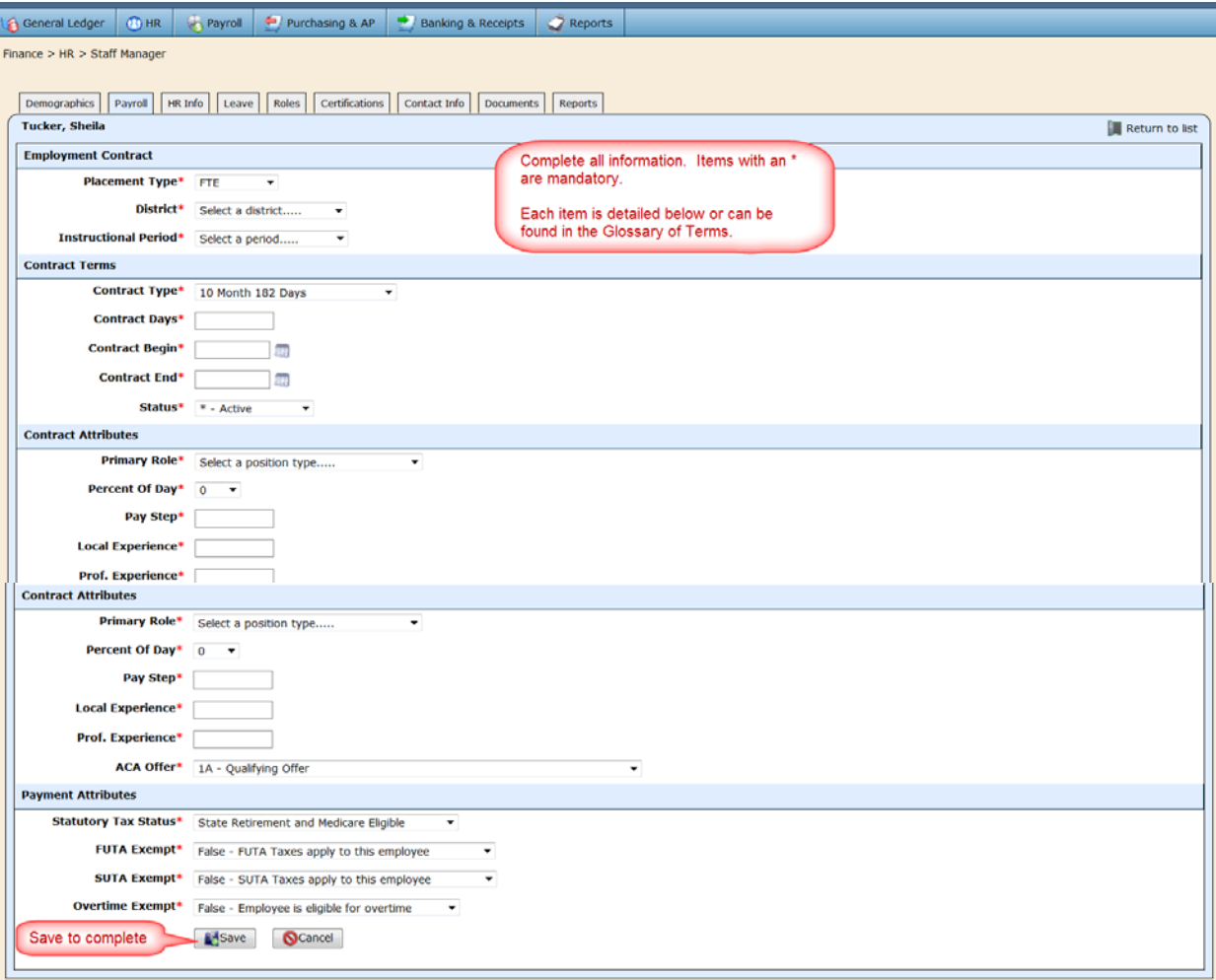
Click on  Add Contract



The screenshot shows the WebSmart HR system interface. At the top, there is a navigation bar with tabs for General Ledger, HR, Payroll, Purchasing & AP, Banking & Receipts, and Reports. Below this, the breadcrumb trail reads "Finance > HR > Staff Manager". A red callout bubble points to the "Payroll" tab in the sub-navigation bar, labeled "Step 1 - Click on Payroll Tab". Below the sub-navigation bar, the employee name "Tucker, Sheila" is displayed. A red callout bubble points to the "Add Contract" button (a green plus sign) in the "Employment Contracts" section, labeled "Step 2 - Click on Add Contract". The "Employment Contracts" section includes a table with columns for System ID, Period, District, Contract Dates, ACA, Days, % of Day, Positions, and Actions. The table currently shows "No Configurations Found" and "Records: 0".

Fill in all of the required information.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

Employment Contract

Placement Type* FTE

District* Select a district.....

Instructional Period* Select a period.....

Contract Terms

Contract Type* 10 Month 182 Days

Contract Days*

Contract Begin*

Contract End*

Status* - Active

Contract Attributes

Primary Role* Select a position type.....

Percent Of Day* 0

Pay Step*

Local Experience*

Prof. Experience*

Contract Attributes

Primary Role* Select a position type.....

Percent Of Day* 0

Pay Step*

Local Experience*

Prof. Experience*

ACA Offer* 1A - Qualifying Offer

Payment Attributes

Statutory Tax Status* State Retirement and Medicare Eligible

FUTA Exempt* False - FUTA Taxes apply to this employee

SUTA Exempt* False - SUTA Taxes apply to this employee

Overtime Exempt* False - Employee is eligible for overtime

Save to complete

Complete all information. Items with an * are mandatory.

Each item is detailed below or can be found in the Glossary of Terms.

- **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.

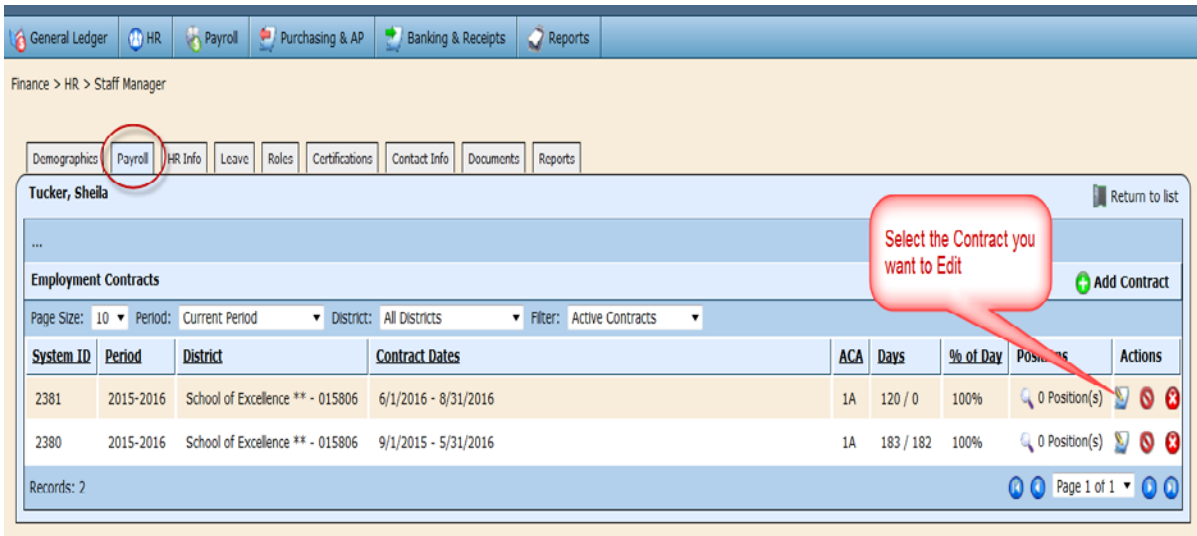
- **Contract Begin** – Enter the contract begin date. This field should indicate the first day the employee reported for work for the instructional period. This information is used for TRAQS reporting.
- **Contract End** – Enter the contract end date. This field should indicate the last date the employee 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.









Finance > HR > Staff Manager

Demographics **Payroll** HR Info Leave Roles Certifications Contract Info Documents Reports

Tucker, Sheila Return to list


Employment Contracts Add Contract


Page Size: 10 Period: Current Period District: All Districts Filter: Active Contracts

System ID	Period	District	Contract Dates	ACA	Days	% of Day	Positions	Actions
2381	2015-2016	School of Excellence ** - 015806	6/1/2016 - 8/31/2016	1A	120 / 0	100%	0 Position(s)	  
2380	2015-2016	School of Excellence ** - 015806	9/1/2015 - 5/31/2016	1A	183 / 182	100%	0 Position(s)	  

Records: 2 Page 1 of 1

If the employee has *multiple* positions:

Click  to **view** those positions.

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




Finance > HR > Staff Manager

Demographics Payroll **HR Info** Leave Roles Certifications Contract Info Documents Reports

Tucker, Sheila Return to list

Employment Contracts Add Contract

Page Size: 10 Period: Current Period District: All Districts Filter: Active Contracts

System ID	Period	District	Contract Dates	ACA	Days	% of Day	Positions	Actions
2380	2015-2016	School of Excellence ** - 015806	9/1/2015 - 8/31/2016	1A	183 / 182	100%	0 Position(s)	  

Records: 1 Page 1 of 1

Click Here to Edit the Position

If the Employee has Multiple Positions, Click here to view those positions. When you see the list, click on the position you want to edit under the "Actions" column

Add/Edit Positions

Finance > HR > Staff Manager >

Click  Position(s)

Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents

Albite

Employment Contracts

Page Size: 10 Period: Current Period Dis

System ID	Period	District	Contract Dates	ACA	% of Day	Positions	Actions
5506	2016-2017		9/1/2016 - 8/31/2017	1A	239 / 239	100%	3 Position(s) [Edit] [Delete]

Records: 1 Page 1 of 1

Click  Add Position


Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Shella

Positions : School of Excellence ** 6/1/2016 - 8/31/2016

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 120 / 0 days

Click Here  Add Position

Page Size: 10 Calendar: All Calendars

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

Records: 0 Page 1 of 1

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

Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Shella

Positions : School of Excellence ** 6/1/2016 - 8/31/2016

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 120 / 0 days

Position Details

Payroll Calendar* Biweekly

Name* Substitute

Position Type* SUBSTITUTE

Payroll Activity Code* 78 - Non-salary

WC Category* Select a category...

Allocation* 100.00

Compensation Type* Hourly

Rate* 15.00

Encumbrance* Calculated

Straight Time Mask* 161 - 00 - 6112 - 00 - 000 - ? - 00 - 0 - 00


Scheduled Payments

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

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

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	420-12-6119.02-101-7-11-0-00	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.

The screenshot shows the HR Info Tab for employee Tucker, Sheila. The breadcrumb trail is Finance > HR > Staff Manager. The HR Info tab is selected, and a red callout box says "Verify you are in the employee's records" and "Select the tab for the area you need to add or edit, such as HR Info". The Demographics section is active, showing the following information:





Field	Value
Name*	Sheila Tucker
SSN*	123-11-1234
State UID*	Not Assigned
Local ID*	001729
Date of Birth*	1/1/1991
Gender*	F - Female
Ethnicity*	0 - Not Hispanic/Latino
Race*	W - White
Demo Release*	NOT authorized to release demographic information

An "Edit Demographics" button is visible in the top right of the Demographics section.

Edit General Attributes

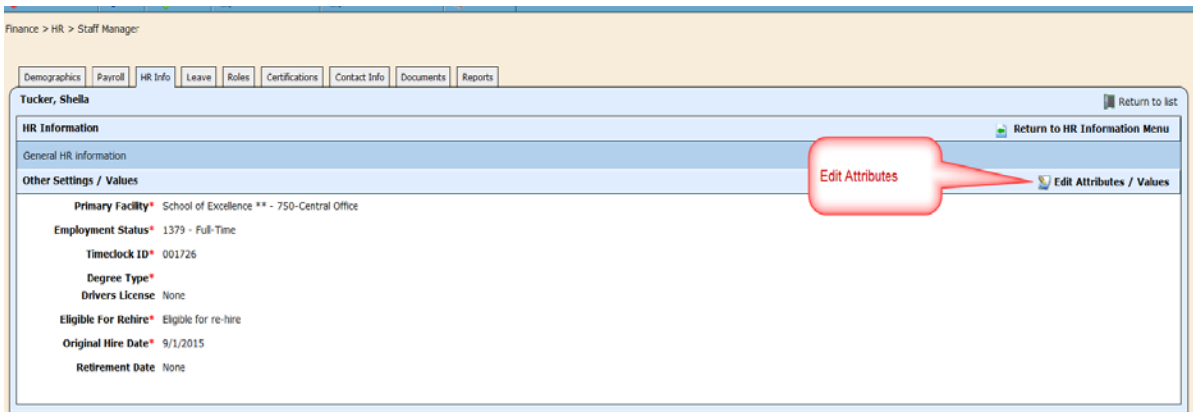
Click  **General HR Attributes** under the HR Info Tab

The screenshot shows the HR Info Editors section for employee Tucker, Sheila. The breadcrumb trail is Finance > HR > Staff Manager. The HR Info tab is selected, and a red callout box says "This will take you back to the previous search screen". The General HR Attributes section is active, showing the following information:

Field	Value
General HR Attributes	 Background Checks [None]
Federal Withholding Elections [None]	 Leave Policy Elections [None]
State Withholding Elections [None]	 Benefit Program Elections [None]
Payment Elections [Live Check]	 Additional Allowance Elections [None]

A red callout box says "Click on the Edit icon to go to General Attributes".

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



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

General HR information

Other Settings / Values Edit Attributes Edit Attributes / Values

Primary Facility* School of Excellence ** - 750-Central Office

Employment Status* 1379 - Full-Time

Timeclock ID* 001726

Degree Type*

Drivers License: None

Eligible For Rehire* Eligible for re-hire

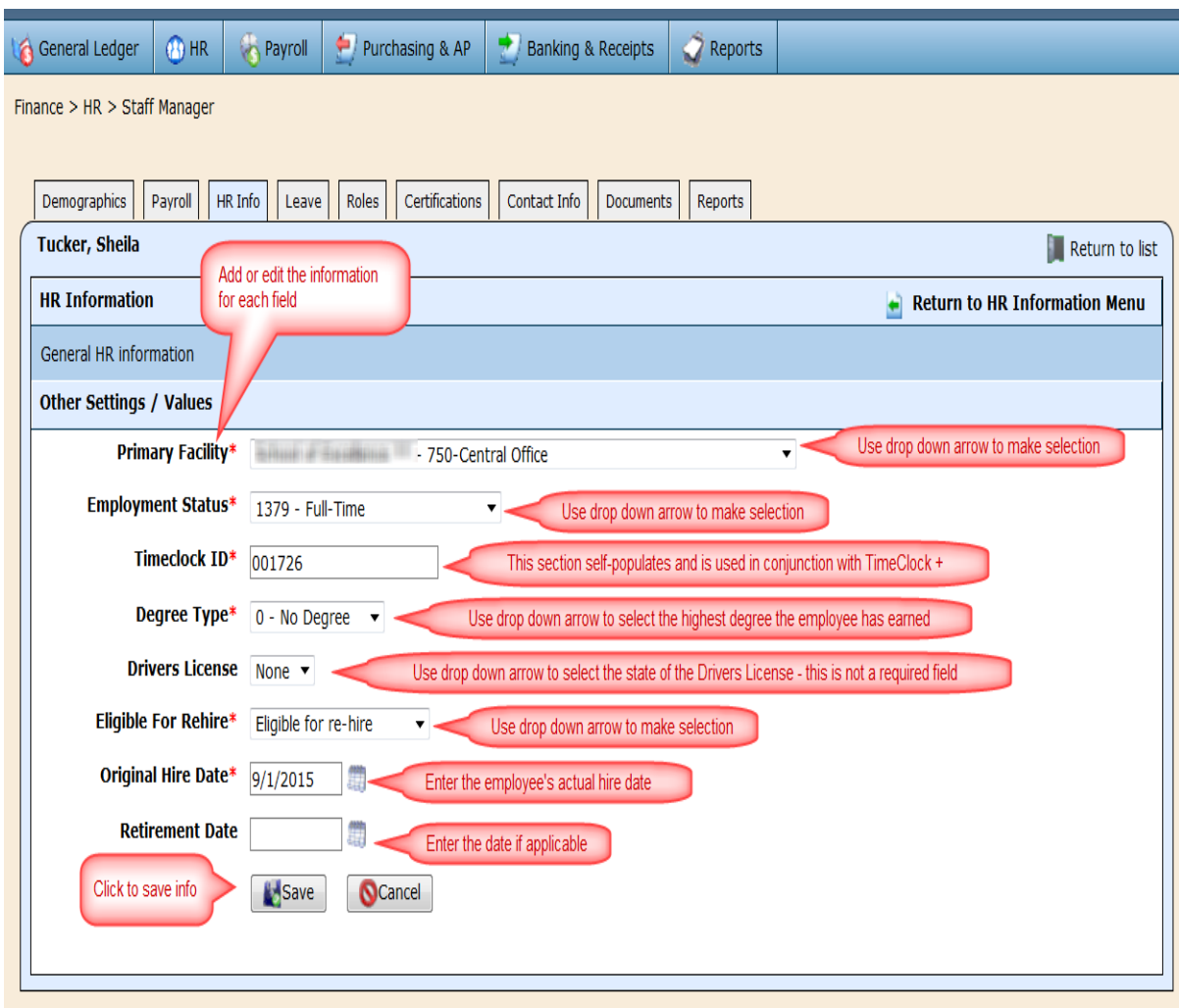
Original Hire Date* 9/1/2015

Retirement Date: None

This will bring you to the Attributes/Values screen.

Enter the information as shown below.

Click  **Save**



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

General HR information

Other Settings / Values

Primary Facility* Use drop down arrow to make selection

Employment Status* Use drop down arrow to make selection

Timeclock ID* This section self-populates and is used in conjunction with TimeClock +

Degree Type* Use drop down arrow to select the highest degree the employee has earned

Drivers License Use drop down arrow to select the state of the Drivers License - this is not a required field

Eligible For Rehire* Use drop down arrow to make selection

Original Hire Date* Enter the employee's actual hire date

Retirement Date Enter the date if applicable

Click to save info

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.

Finance > HR > Staff Manager

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

Tucker, Sheila [Return to list](#)

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

General HR information **Verify Information is correct for each item**

Other Settings / Values [Edit Attributes / Values](#)

Primary Facility* School of Excellence - 750-Central Office

Employment Status* 1379 - Full-Time

Timeclock ID* 001726

Degree Type*

Drivers License None

Eligible For Rehire* Eligible for re-hire

Original Hire Date* 9/1/2015

Retirement Date None

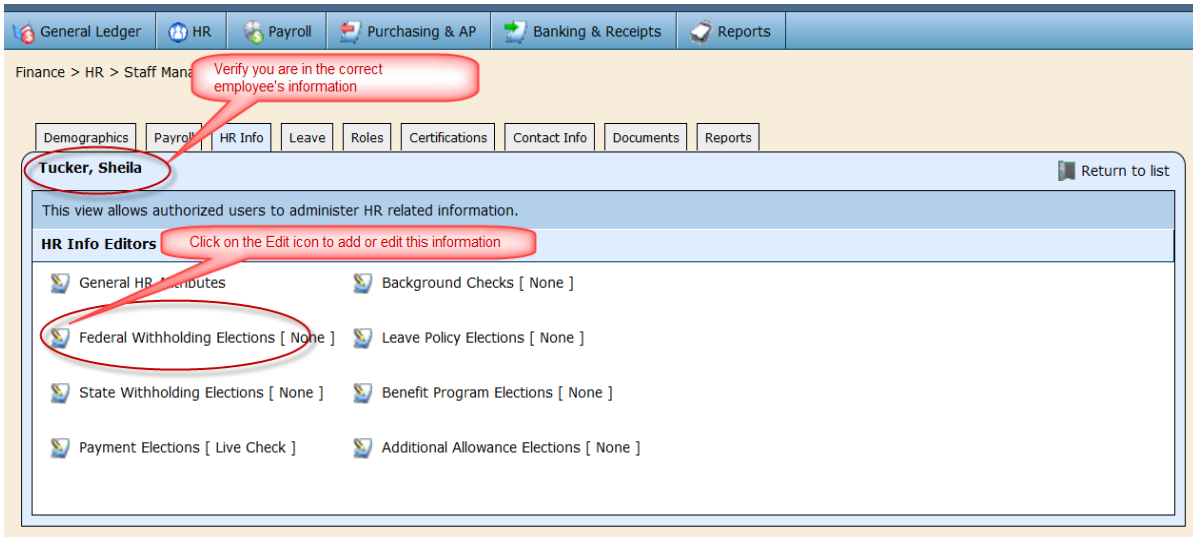
If information is correct, Return to the HR Information Menu to go to the next section

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



Finance > HR > Staff Manager

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

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

Tucker, Sheila Return to list

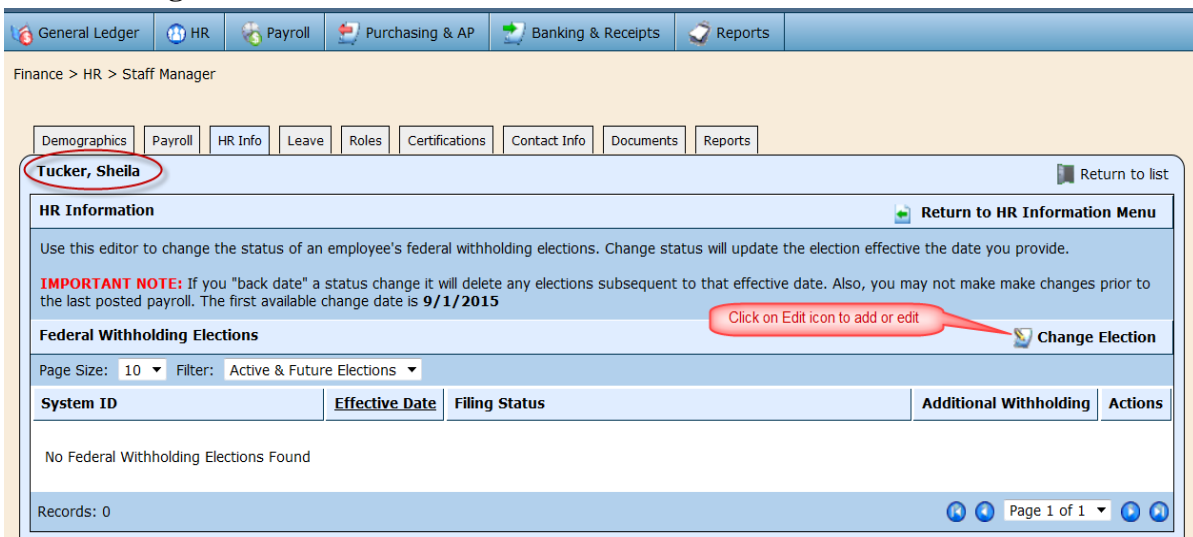
Verify you are in the correct employee's information

This view allows authorized users to administer HR related information.

HR Info Editors Click on the Edit icon to add or edit this information

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

Click  **Change Election**



Finance > HR > Staff Manager

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

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

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Federal Withholding Elections Click on Edit icon to add or edit Change Election

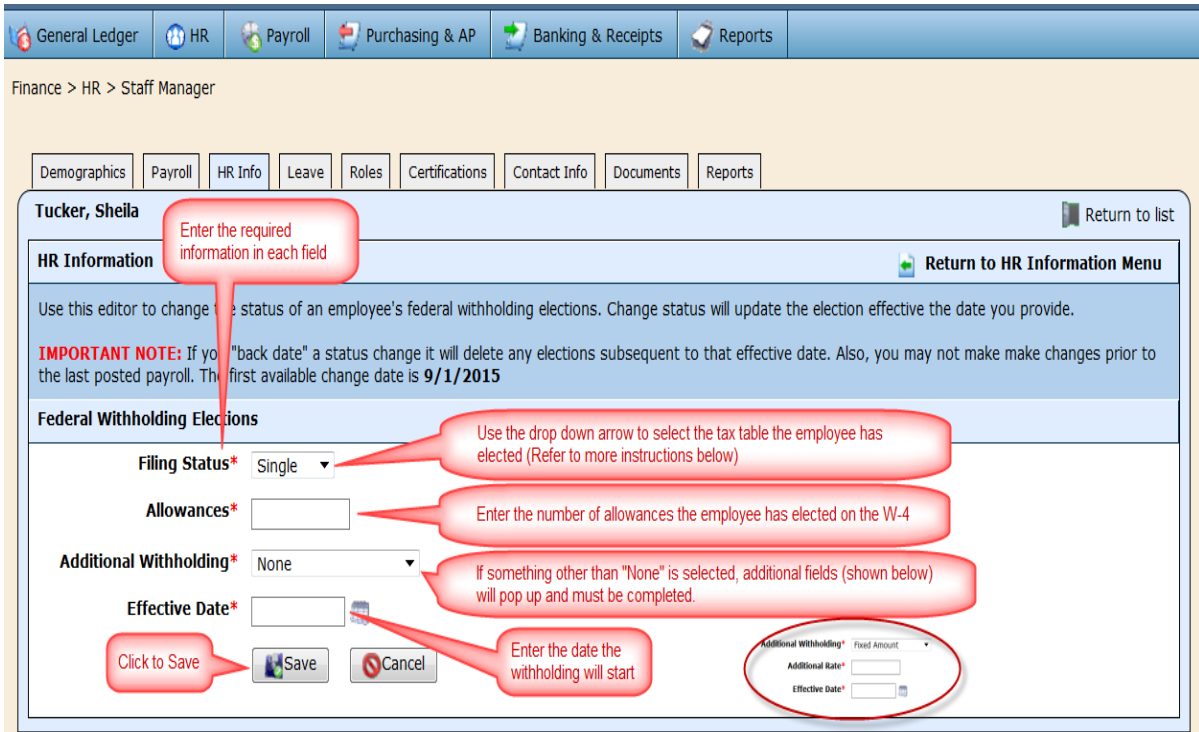
Page Size: 10 Filter: Active & Future Elections

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

Records: 0 Page 1 of 1

Enter the required information (see descriptions below):

Click  Save



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Federal Withholding Elections

Filing Status* Single

Allowances*

Additional Withholding* None

Effective Date*

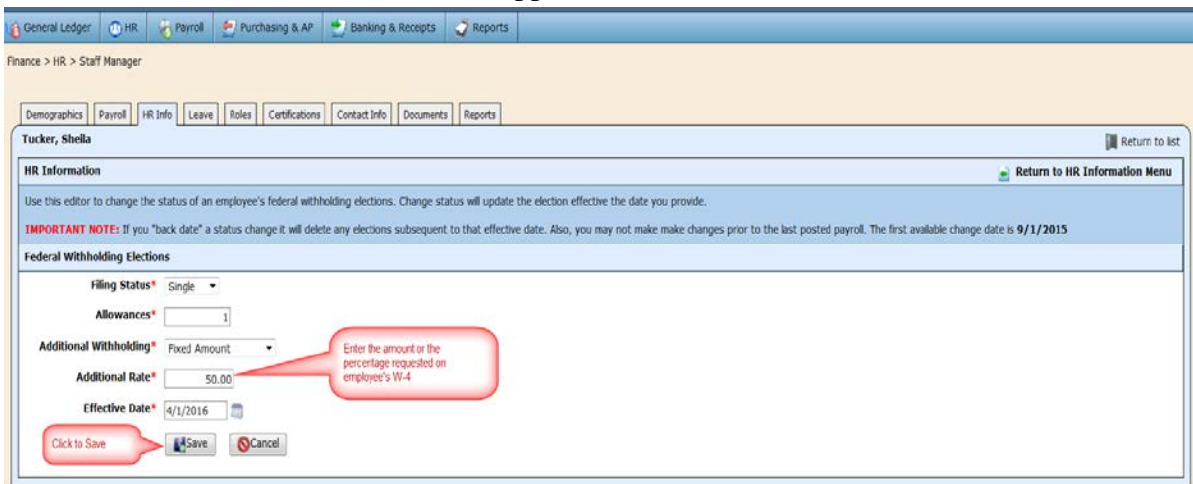
Click to Save

Additional Withholding* Fixed Amount

Additional Rate*

Effective Date*

- **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.



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Federal Withholding Elections

Filing Status* Single

Allowances*

Additional Withholding* Fixed Amount

Additional Rate*

Effective Date*

Click to Save

- **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.

The screenshot shows the HR Information Menu for an employee named Tucker, Sheila. The page includes a navigation bar with tabs for Demographics, Payroll, HR Info, Leave, Roles, Certifications, Contact Info, Documents, and Reports. The HR Info tab is selected. Below the navigation bar, there is a section for Federal Withholding Elections. A table displays the following data:

System ID	Effective Date	Filing Status	Additional Withholding	Actions
1124	4/1/2016	Single - 1 allowance(s)	\$50.00 dollar(s)	[Edit] [Delete]

Annotations in the screenshot include a red callout pointing to the 'Return to HR Information Menu' button with the text 'To go to the next section', and another red callout pointing to the 'Change Election' button with the text 'Click Edit to change a withholding'.

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

The screenshot shows the HR Info Editors section for Tucker, Sheila. A red callout points to the employee name with the text 'Verify you are in the correct employee's information'. Another red callout points to the 'Edit' icon next to 'State Withholding Elections [None]' with the text 'Click on the Edit icon to add or edit this information'. The HR Info Editors section contains the following items:

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

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila [Return to list](#)

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

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

State Withholding Elections [Change Election](#)

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

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

Records: 0 [Page 1 of 1](#)

Click [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](#)

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila [Return to list](#)

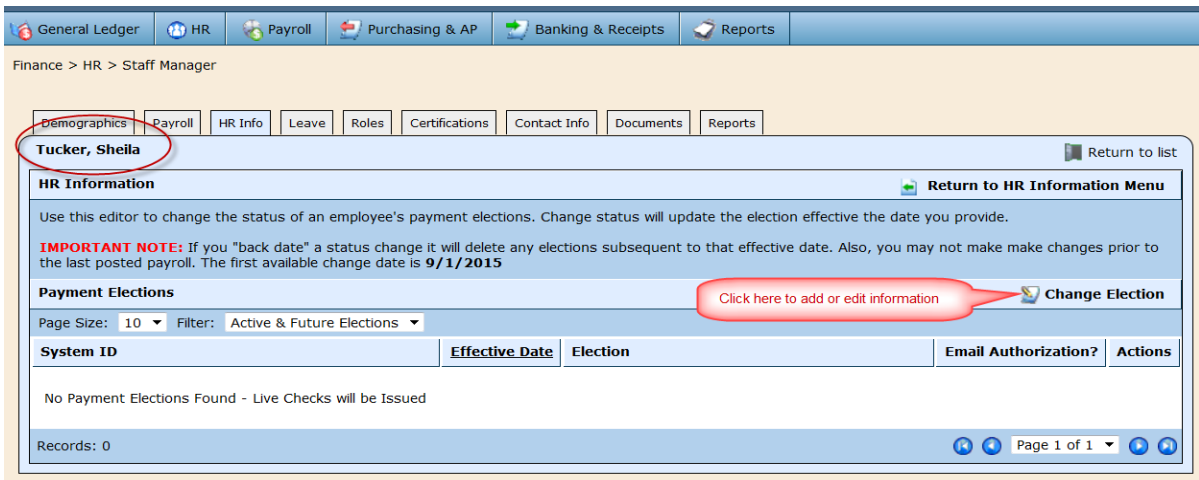
This view allows authorized users to administer HR related information.

HR Info Editors

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

Click on the Edit icon to add or edit this information

Click  **Change Election**



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila [Return to list](#)

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

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Payment Elections [Click here to add or edit information](#) [Change Election](#)

Page Size: 10 Filter: Active & Future Elections

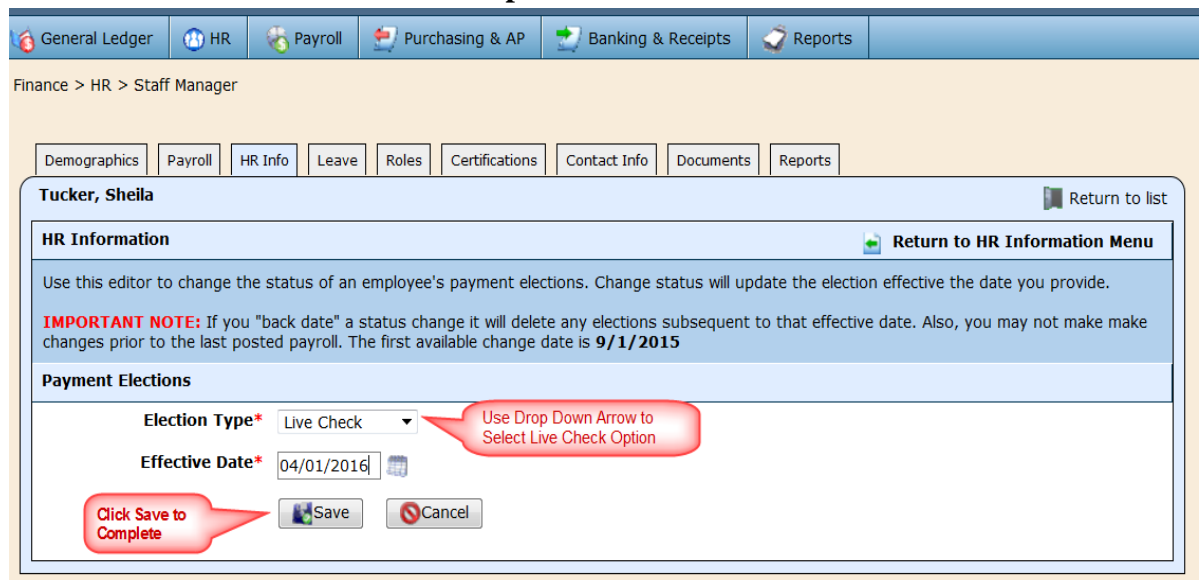
System ID	Effective Date	Election	Email Authorization?	Actions
No Payment Elections Found - Live Checks will be Issued				

Records: 0 [Page 1 of 1](#)

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



Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila [Return to list](#)

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

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Payment Elections

Election Type* Live Check [Use Drop Down Arrow to Select Live Check Option](#)

Effective Date* 04/01/2016

[Click Save to Complete](#) [Save](#) [Cancel](#)

- **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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Payment Elections

Election Type* Direct Deposit Use the drop down arrow to select option. For Direct Deposit, the screen will look like this.

Notification* Do not perform any notification Use drop down arrow to select notification type

Effective Date* Enter effective date

Distributions Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate

Click Save to complete Save Cancel

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Payment Elections

Election Type* Direct Deposit If Direct Deposit is selected, click on Add Distribution BEFORE saving

Notification* Send notification as email attachment

Effective Date* 4/1/2016

Distributions Add Distribution

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Percentage Enter % of pay to be deposited to designated bank	Select a bank.... Select employees Banking information from drop down arrow	<input type="text"/> Enter Employee's Bank	NOT a Savings Account Select type of account from drop down arrow	<input type="text"/> If depositing to multiple accounts, % must equal 100

Save Cancel

- **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.
- **Rate** - Enter the rate.
 - If distribution type is a percentage then the rate is a percentage. The percentage HAS to equal 100%.
 - If distribution type is a flat amount then the rate is a dollar amount.

Example – Deposit to One Bank

Finance > HR > Staff Manager

Tucker, Sheila

HR Information

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is 9/1/2015

Payment Elections

Election Type* Direct Deposit

Notification* Do not perform any notification

Effective Date* 4/1/16

Distributions

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Percentage	063000047 - Bank of America-063000047	123456	NOT a Savings Account	100.00

Save Cancel

***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

Finance > HR > Staff Manager

Tucker, Sheila

HR Information

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is 9/1/2015

Payment Elections

Election Type* Direct Deposit

Notification* Do not perform any notification

Effective Date* 4/1/16

Distributions

#	Distribution Type	Bank	Account Number	Checking?	Rate
1	Flat Amount	063000047 - Bank of America-063000047	123456	NOT a Savings Account	500.00
2	Percentage	322271724 - CITIBANK-322271724	234567	Savings Account	100.00

Save Cancel

Flat Amount

Use 100% for the remainder of the check

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 must 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.

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Leave Policy Elections Change Election

Page Size: 10 Filter: Active & Future Elections

System ID	Effective Date	Policy	Actions
1135	4/1/2016	All Year Employees	

Records: 1 Page 1 of 1

Select to change the employee's policy

Once a policy has been used, "Locked" will be shown under ACTIONS and it cannot be edited

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**

Finance > HR > Staff Manager Verify you are in the correct employee's information

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

Tucker, Sheila Return to list

This view allows authorized users to administer HR related information.

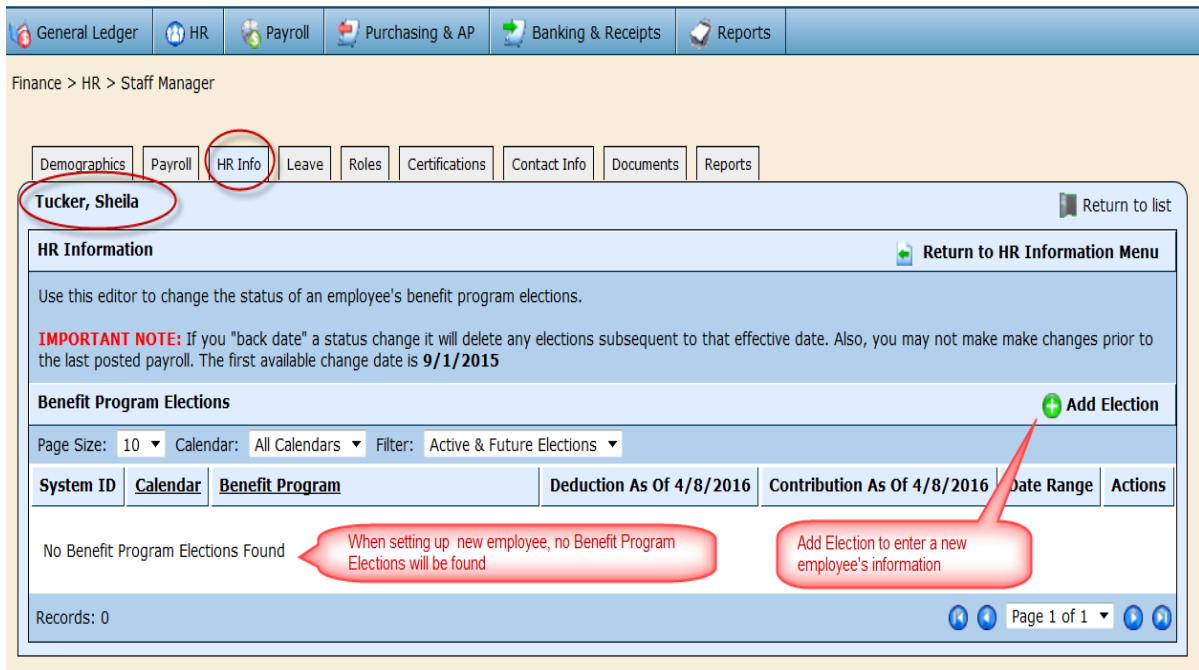
HR Info Editors

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

Click on the Edit icon to add or edit this information

Add an Election

Click  **Add Election**



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Staff Manager

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

Tucker, Sheila [Return to list](#)

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

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Benefit Program Elections [+ Add Election](#)

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

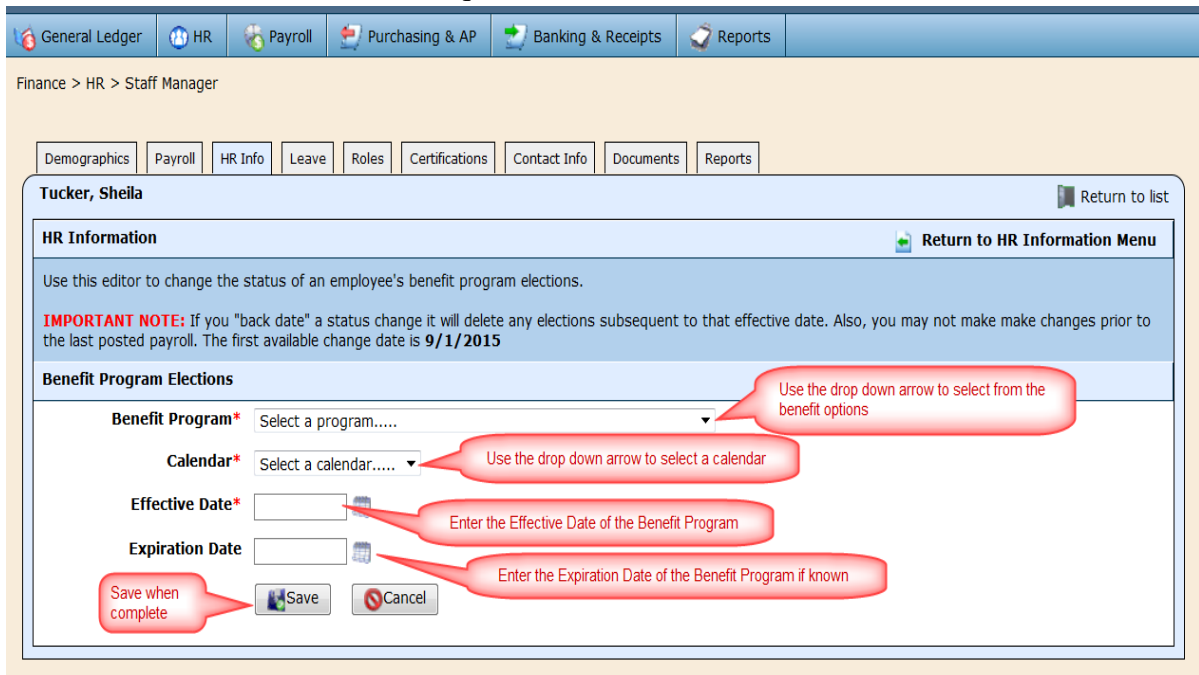
System ID	Calendar	Benefit Program	Deduction As Of 4/8/2016	Contribution As Of 4/8/2016	Date Range	Actions
No Benefit Program Elections Found						

Records: 0 Page 1 of 1

When setting up new employee, no Benefit Program Elections will be found

Add Election to enter a new employee's information

Enter the information in each of the required fields.



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila [Return to list](#)

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

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Benefit Program Elections

Benefit Program* Select a program..... *Use the drop down arrow to select from the benefit options*

Calendar* Select a calendar..... *Use the drop down arrow to select a calendar*

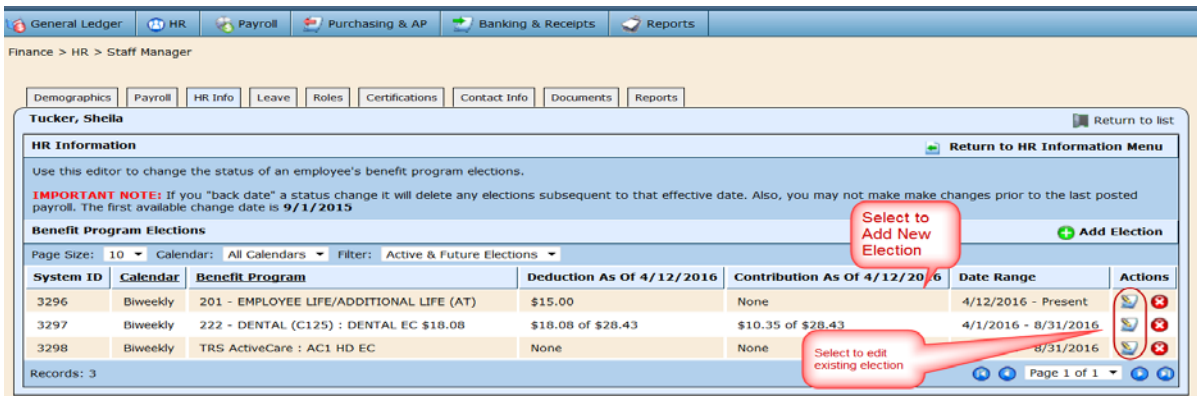
Effective Date* *Enter the Effective Date of the Benefit Program*

Expiration Date *Enter the Expiration Date of the Benefit Program if known*

Save when complete

Edit Existing Election

Click  to edit an existing election.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list







HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

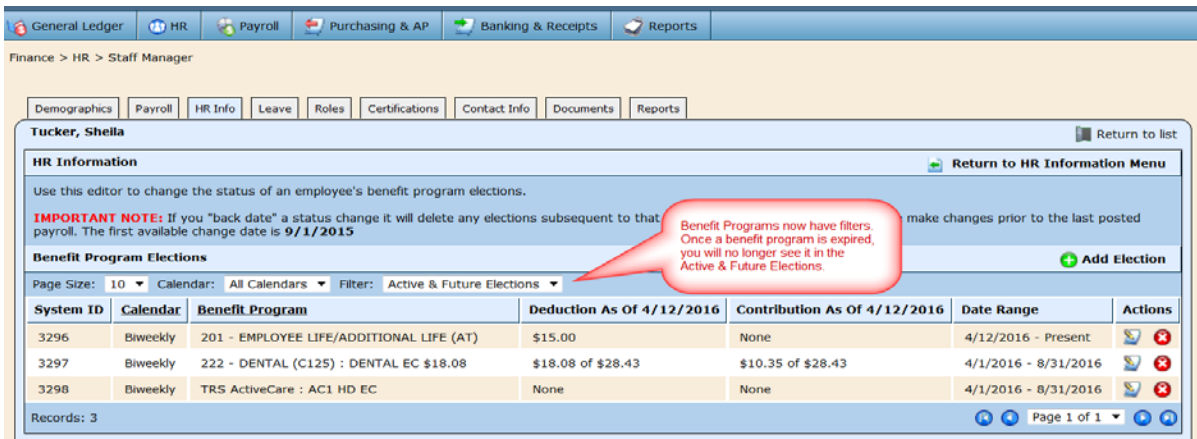
Benefit Program Elections Add Election

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

System ID	Calendar	Benefit Program	Deduction As Of 4/12/2016	Contribution As Of 4/12/2016	Date Range	Actions
3296	Biweekly	201 - EMPLOYEE LIFE/ADDITIONAL LIFE (AT)	\$15.00	None	4/12/2016 - Present	 
3297	Biweekly	222 - DENTAL (C125) : DENTAL EC \$18.08	\$18.08 of \$28.43	\$10.35 of \$28.43	4/1/2016 - 8/31/2016	 
3298	Biweekly	TRS ActiveCare : AC1 HD EC	None	None	8/31/2016	 

Records: 3 Page 1 of 1

Verify the Filter is the one you need.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list







HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Benefit Program Elections Add Election

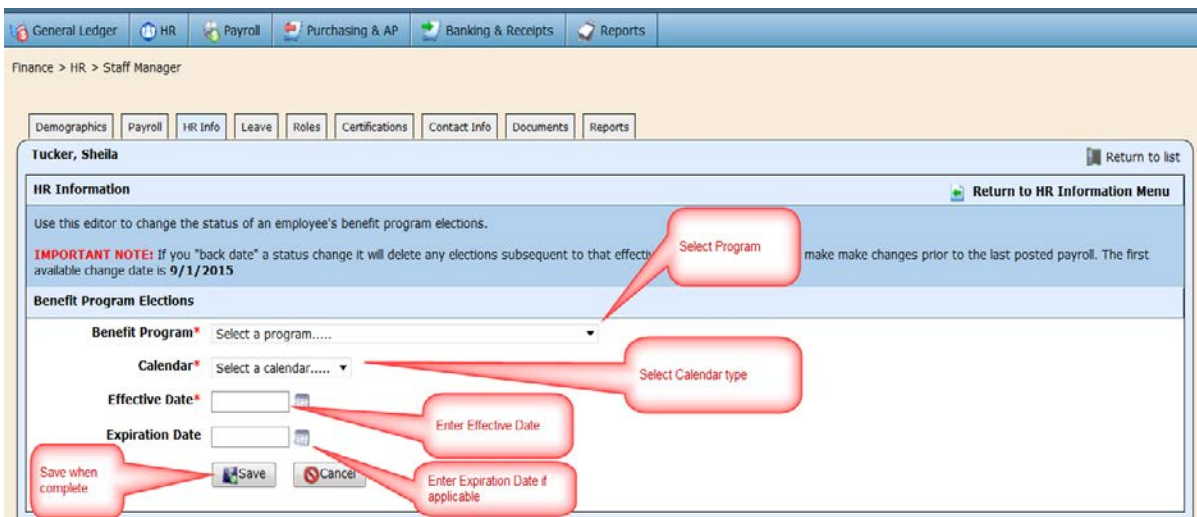
Page Size: 10 | Calendar: All Calendars | Filter: Active & Future Elections

System ID	Calendar	Benefit Program	Deduction As Of 4/12/2016	Contribution As Of 4/12/2016	Date Range	Actions
3296	Biweekly	201 - EMPLOYEE LIFE/ADDITIONAL LIFE (AT)	\$15.00	None	4/12/2016 - Present	 
3297	Biweekly	222 - DENTAL (C125) : DENTAL EC \$18.08	\$18.08 of \$28.43	\$10.35 of \$28.43	4/1/2016 - 8/31/2016	 
3298	Biweekly	TRS ActiveCare : AC1 HD EC	None	None	4/1/2016 - 8/31/2016	 

Records: 3 Page 1 of 1

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

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

HR Information Return to HR Information Menu

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

IMPORTANT NOTE: If you "back date" a status change it will delete any elections subsequent to that effective date. Also, you may not make changes prior to the last posted payroll. The first available change date is **9/1/2015**

Benefit Program Elections

Benefit Program* Select a program..... Select Program

Calendar* Select a calendar..... Select Calendar type

Effective Date* Enter Effective Date

Expiration Date Enter Expiration Date if applicable

Save when complete

- **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.

System ID	Calendar	Benefit Program	Deduction As Of 4/12/2016	Contribution As Of 4/12/2016	Date Range	Actions
3296	Biweekly	201 - EMPLOYEE LIFE/ADDITIONAL LIFE (AT)	\$15.00	None	4/12/2016 - Present	[Edit] [Delete]
3297	Biweekly	222 - DENTAL (C125) : DENTAL EC \$18.08	\$18.08 of \$28.43	\$10.35 of \$28.43	4/1/2016 - 8/31/2016	[Edit] [Delete]
3298	Biweekly	TRS ActiveCare : AC1 HD EC	None	None	4/1/2016 - 8/31/2016	[Edit] [Delete]

***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.

Calculation Method will be either Flat Amount or % of Earnings

For Flat Rate, Enter \$ Amount
For % of Earnings, enter a percentage

- **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.

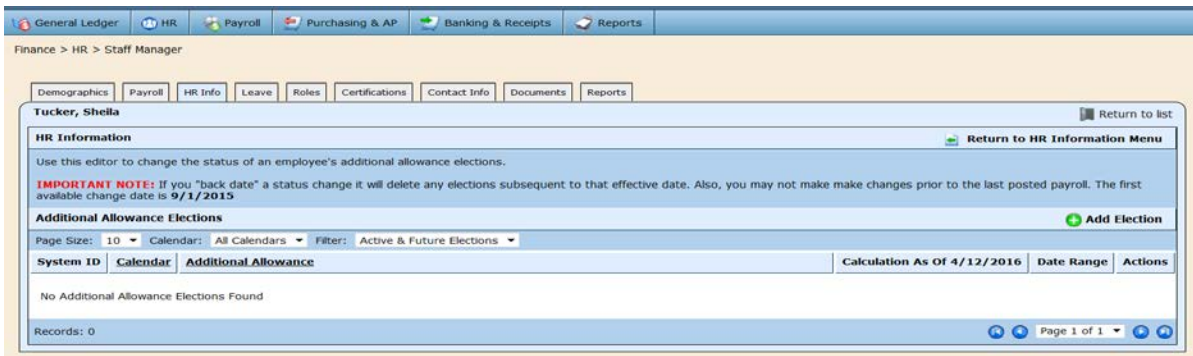
Click **Return to HR Information Menu**

Additional Elections

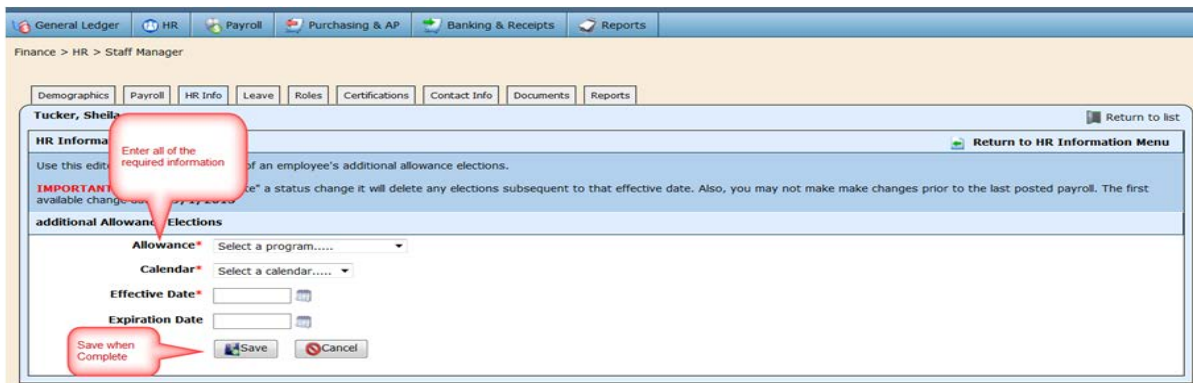
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, “Search for an Existing Employee.”*

Click **Additional Allowance Elections**

Click  **Add Election**

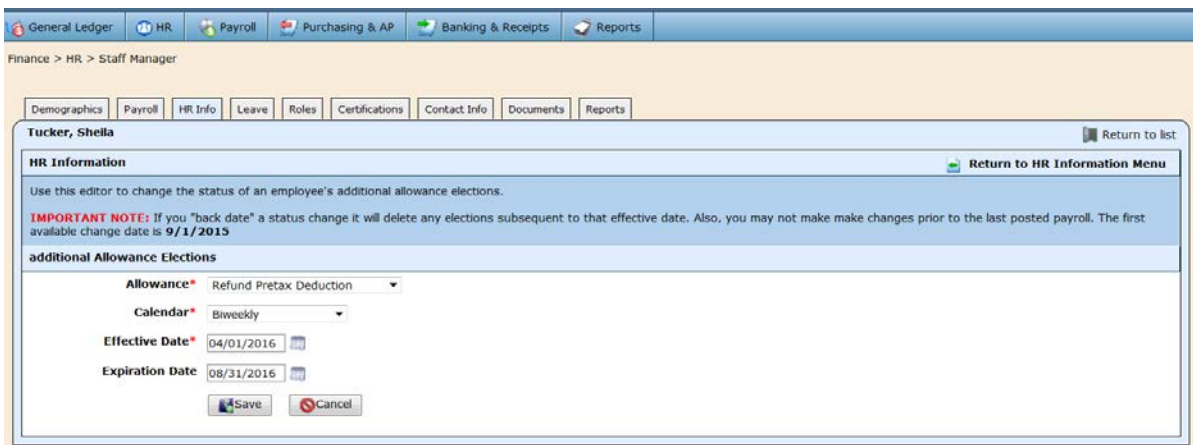


Add or Edit the information required in the fields below.



- **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.

Finance > HR > Staff Manager

Select the tab you want to add or edit, such as Leave

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

Tucker, Sheila Return to list

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

Leave for: 2015-2016 School Year Initialize Leave Balance

Category/Type	Carried Forward	Earned		Used	Dock			Available	Actions
		Adjusted	Accrued		Grace	Reduced	Full		
No Leave History									

Click **Initialize Leave Balance**

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

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

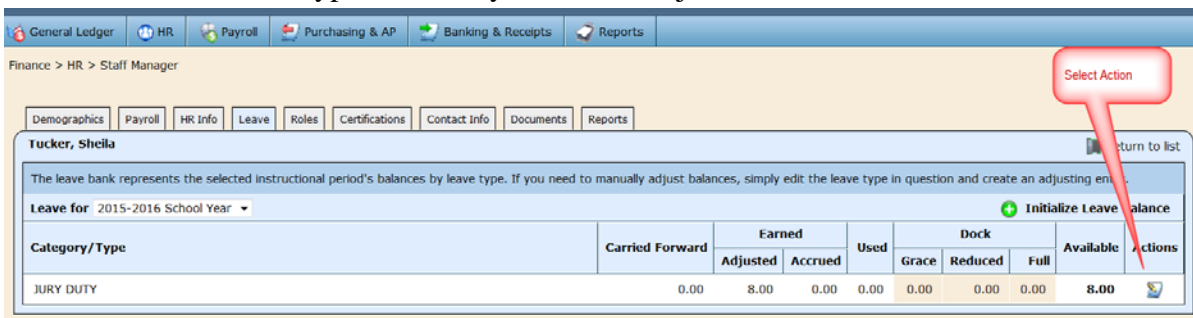
Leave for: 2015-2016 School Year Initialize Leave Balance

Category/Type	Carried Forward	Earned		Used	Dock			Available	Actions
		Adjusted	Accrued		Grace	Reduced	Full		
JURY DUTY	0.00	8.00	0.00	0.00	0.00	0.00	0.00	8.00	

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.




Finance > HR > Staff Manager

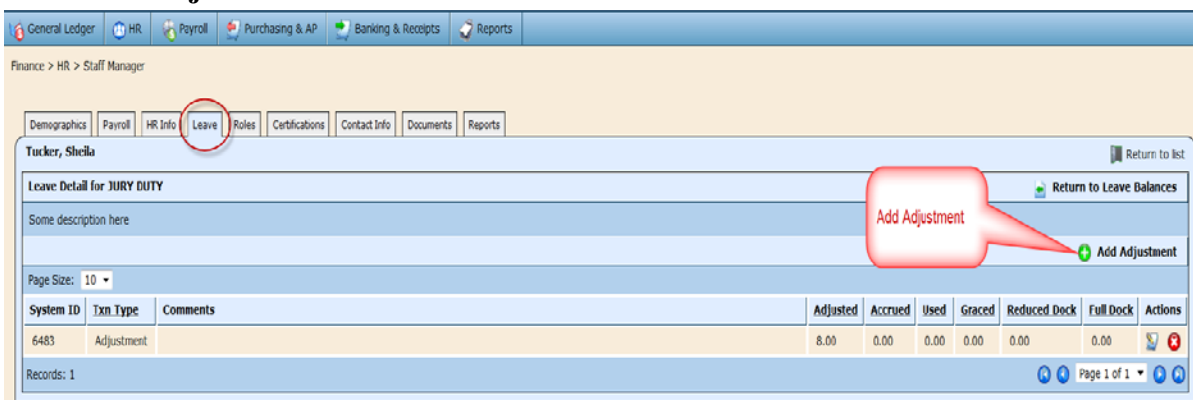
Tucker, Sheila

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

Leave for: 2015-2016 School Year + Initialize Leave Balance

Category/Type	Carried Forward	Earned		Used	Dock			Available	Actions
		Adjusted	Accrued		Grace	Reduced	Full		
JURY DUTY	0.00	8.00	0.00	0.00	0.00	0.00	0.00	8.00	

Click  **Add Adjustment**




Finance > HR > Staff Manager

Tucker, Sheila

Leave Detail for JURY DUTY

Some description here

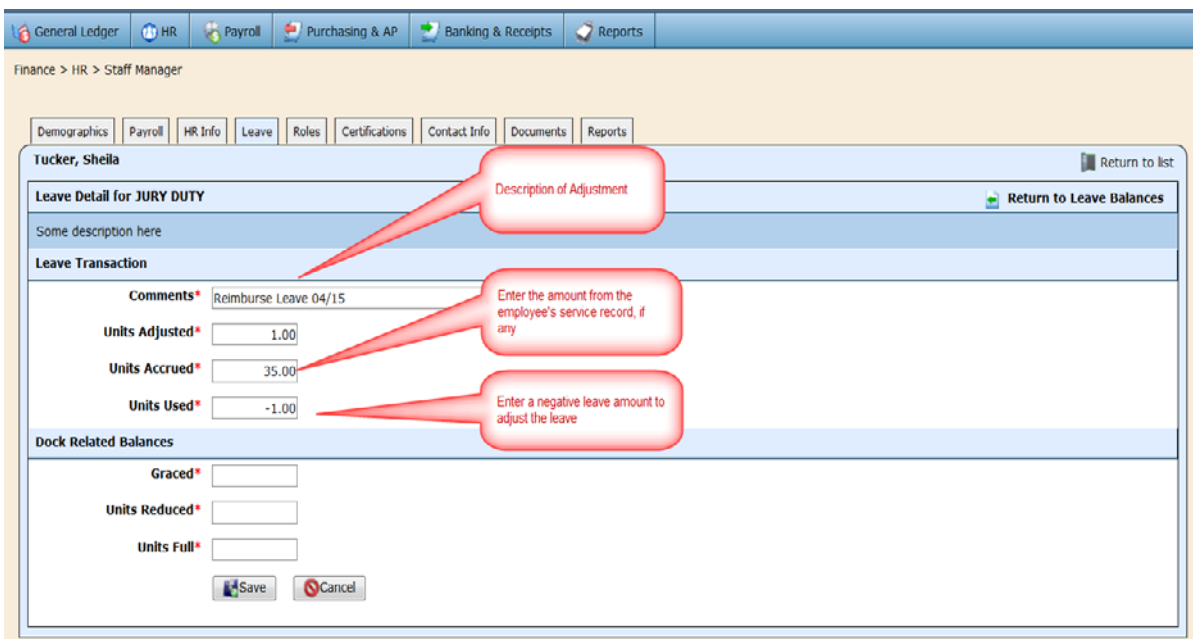
Page Size: 10

System ID	Txn Type	Comments	Adjusted	Accrued	Used	Graced	Reduced Dock	Full Dock	Actions
6483	Adjustment		8.00	0.00	0.00	0.00	0.00	0.00	

Records: 1

Enter the information on the screen below:

Click  **Save**



Finance > HR > Staff Manager

Tucker, Sheila

Leave Detail for JURY DUTY

Some description here

Leave Transaction

Comments* Reimburse Leave 04/15

Units Adjusted*

Units Accrued*

Units Used*

Dock Related Balances

Graced*

Units Reduced*

Units Full*

- **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.

Leave for	Category	Carried Forward	Earned		Used	Dock			Available	Actions
			Adjusted	Accrued		Grace	Reduced	Full		
2015-2016 School Year										
2014-2015 School Year										
2013-2014 School Year	JURY DUTY	0.00	8.00	0.00	0.00	0.00	0.00	0.00	8.00	
2012-2013 School Year										
2011-2012 School Year										
2010-2011 School Year										
2009-2010 School Year										
2008-2009 School Year										

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.

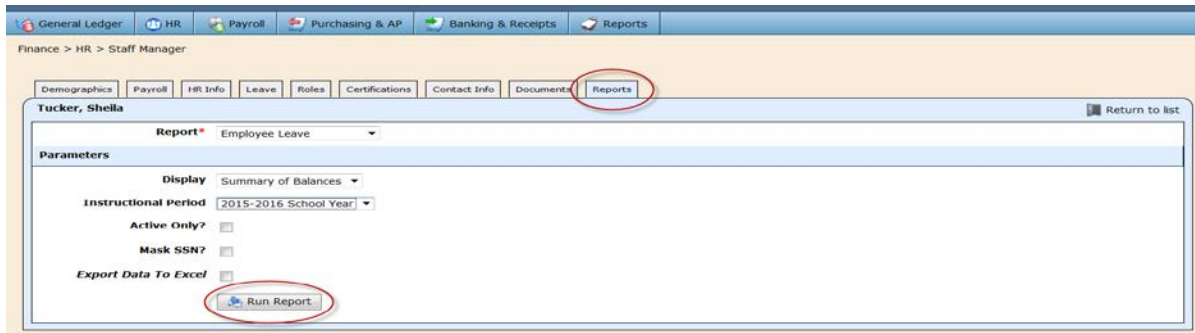
Category/Type	Carried Forward	Earned		Used	Dock			Available	Actions
		Adjusted	Accrued		Grace	Reduced	Full		
JURY DUTY	0.00	5.00	0.00	0.00	0.00	0.00	0.00	5.00	
SCHOOL RELATED	0.00	4.00	4.00	0.00	0.00	0.00	0.00	8.00	

Report

Finance > HR > Staff Manager > Reports (Tab)

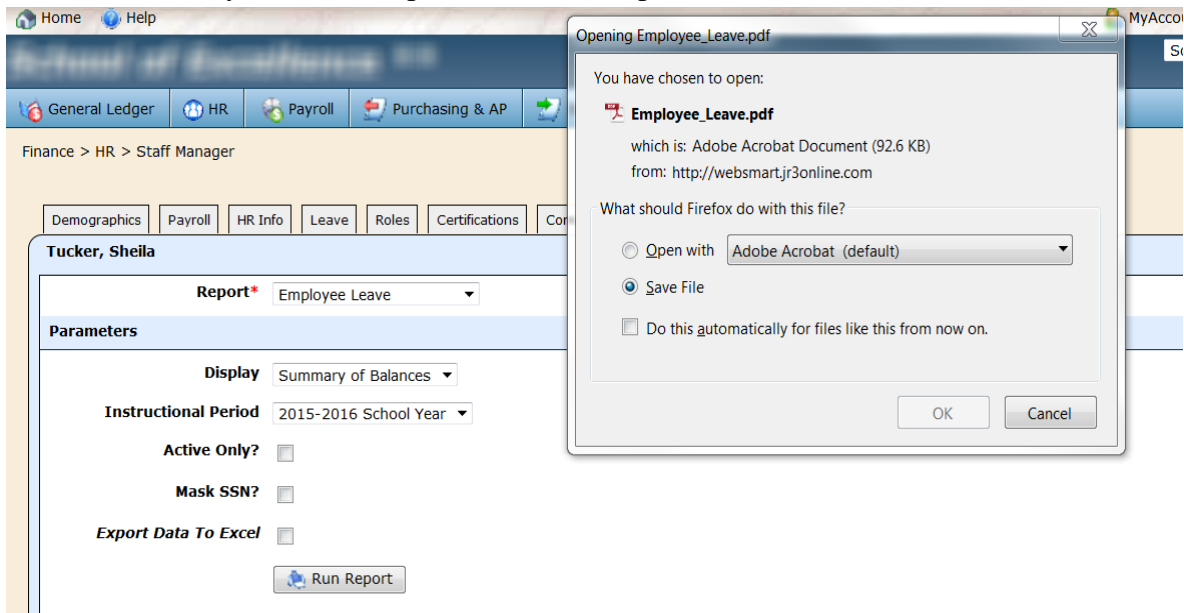
Employee Leave report – after entering the leave adjustment, you will be able to see it on the Employee Leave report.

Go to the Reports Tab .



Select **“Run Report”** to generate a Report that you can either save or open in Adobe 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:

School of Excellence™ District #015806		Employee Leave <i>Summary of Balances</i>					
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 <small>1025-416-10294</small>							
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 <small>1025-416-10294</small>							
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	

Click on Tools, Comment and Share to access additional features.
12:07:28 AM

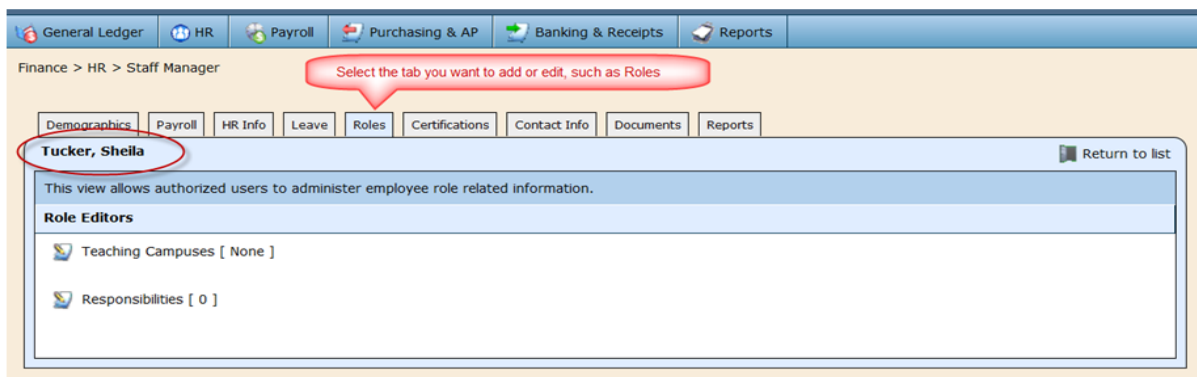
Step 5 – Roles

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

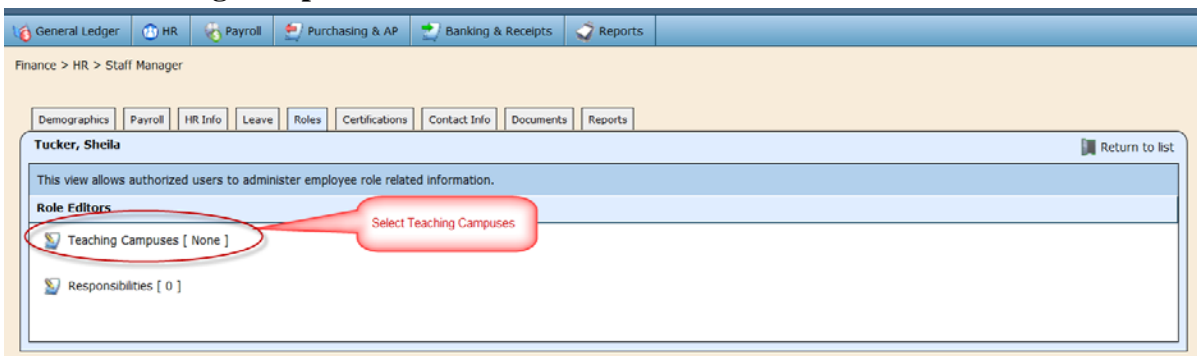
***Verify you are on the employee record you need to set up or edit. If you are not, refer to Chapter 1, “Search for an Existing Employee.”*


Click on the **Roles Tab**

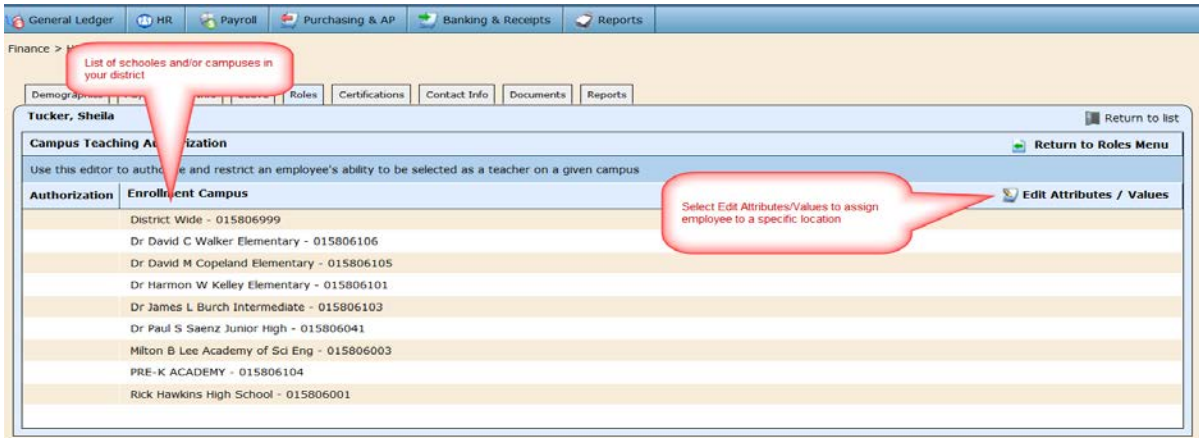


Teaching Campuses

Select  **Teaching Campuses**



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



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance >

Tucker, Sheila

Campus Teaching Authorization Return to list

Use this editor to authorize and restrict an employee's ability to be selected as a teacher on a given campus

Authorization	Enrollment Campus
<input type="checkbox"/>	District Wide - 015806999
<input type="checkbox"/>	Dr David C Walker Elementary - 015806106
<input type="checkbox"/>	Dr David M Copeland Elementary - 015806105
<input type="checkbox"/>	Dr Harmon W Kelley Elementary - 015806101
<input type="checkbox"/>	Dr James L Burch Intermediate - 015806103
<input type="checkbox"/>	Dr Paul S Saenz Junior High - 015806041
<input type="checkbox"/>	Milton B Lee Academy of Sci Eng - 015806003
<input type="checkbox"/>	PRE-K ACADEMY - 015806104
<input type="checkbox"/>	Rick Hawkins High School - 015806001

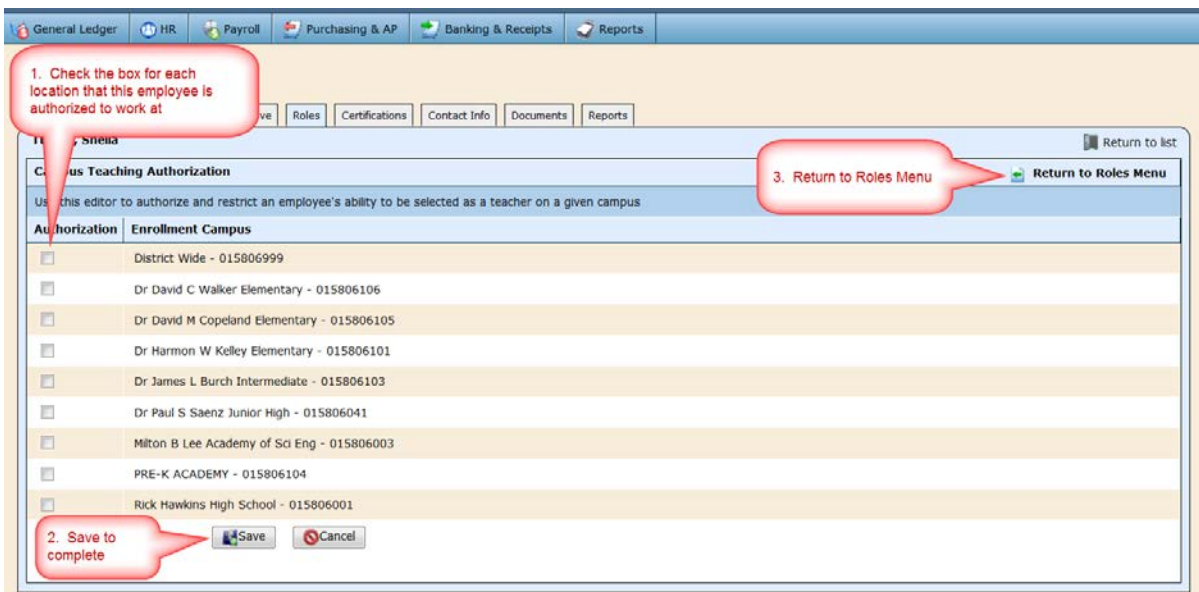
Edit Attributes / Values

Select Edit Attributes/Values to assign employee to a specific location

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**



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Tucker, Sheila

Campus Teaching Authorization Return to list

Use this editor to authorize and restrict an employee's ability to be selected as a teacher on a given campus

Authorization	Enrollment Campus
<input type="checkbox"/>	District Wide - 015806999
<input type="checkbox"/>	Dr David C Walker Elementary - 015806106
<input type="checkbox"/>	Dr David M Copeland Elementary - 015806105
<input type="checkbox"/>	Dr Harmon W Kelley Elementary - 015806101
<input type="checkbox"/>	Dr James L Burch Intermediate - 015806103
<input type="checkbox"/>	Dr Paul S Saenz Junior High - 015806041
<input type="checkbox"/>	Milton B Lee Academy of Sci Eng - 015806003
<input type="checkbox"/>	PRE-K ACADEMY - 015806104
<input type="checkbox"/>	Rick Hawkins High School - 015806001


Save Cancel

1. Check the box for each location that this employee is authorized to work at

2. Save to complete

3. Return to Roles Menu

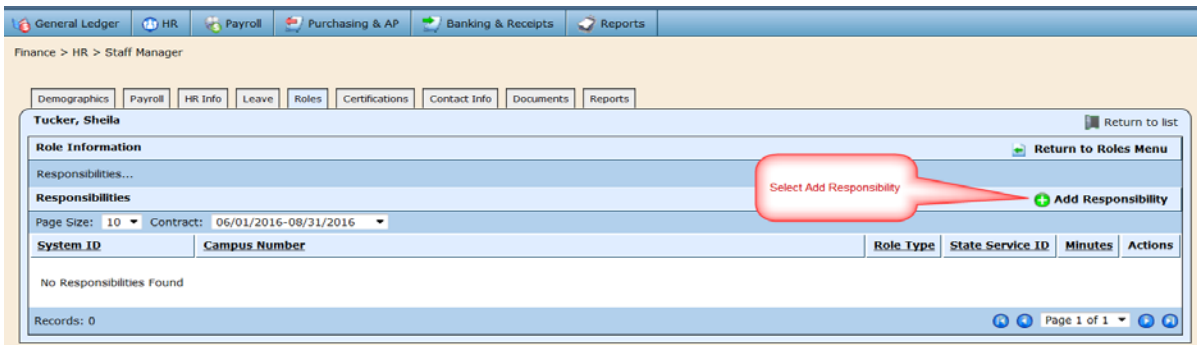
Return to Roles Menu

 **Return to Roles Menu**

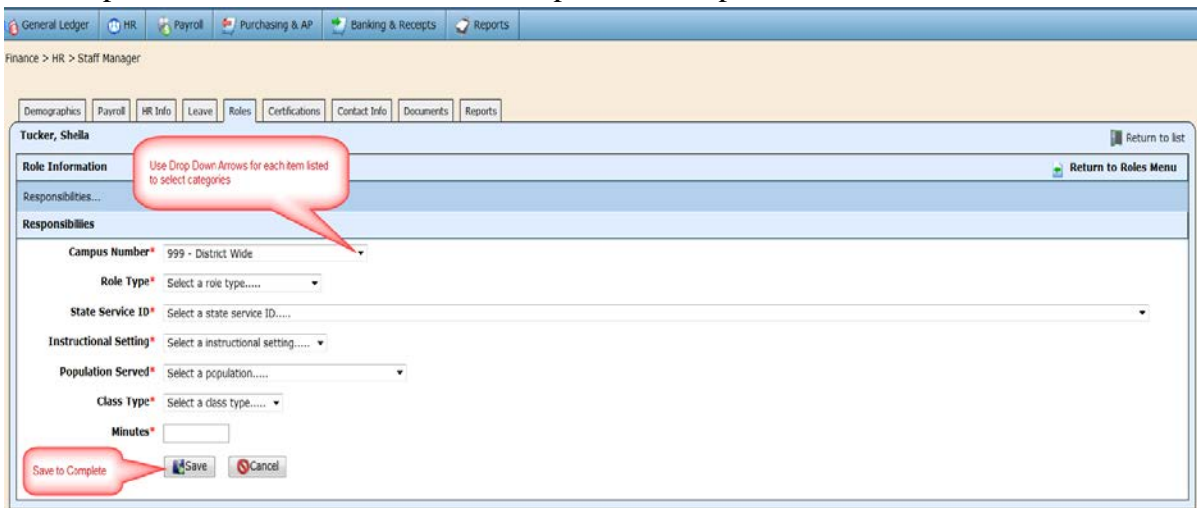
Responsibilities

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.

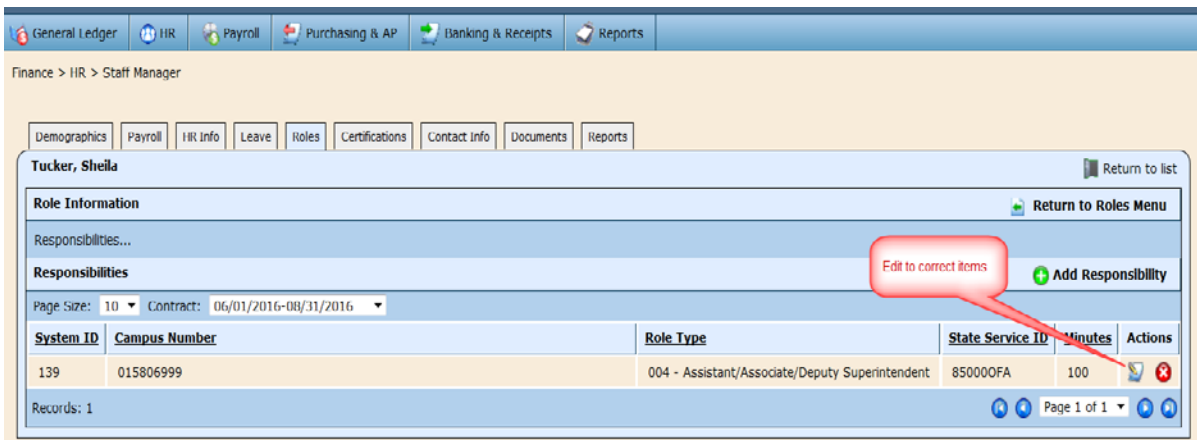


This will bring you to a summary screen. Please verify the information you have entered is correct before proceeding to the next section.

Select  to edit the role responsibility

OR

Select  to delete the role responsibility



Step 6 - Certifications

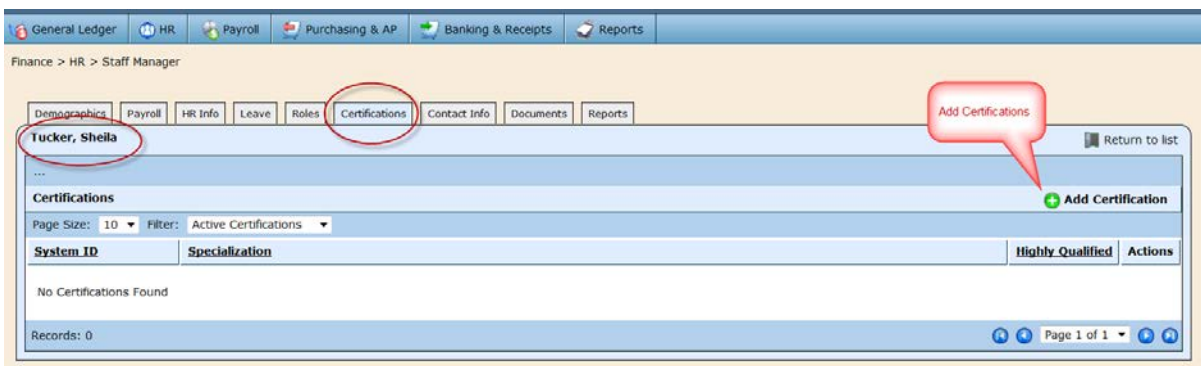
Some courses require an employee be certified. In this section, Certifications identify the course(s) an employee is eligible to teach and where the certification was obtained. -

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**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila

Return to list

Add Certification

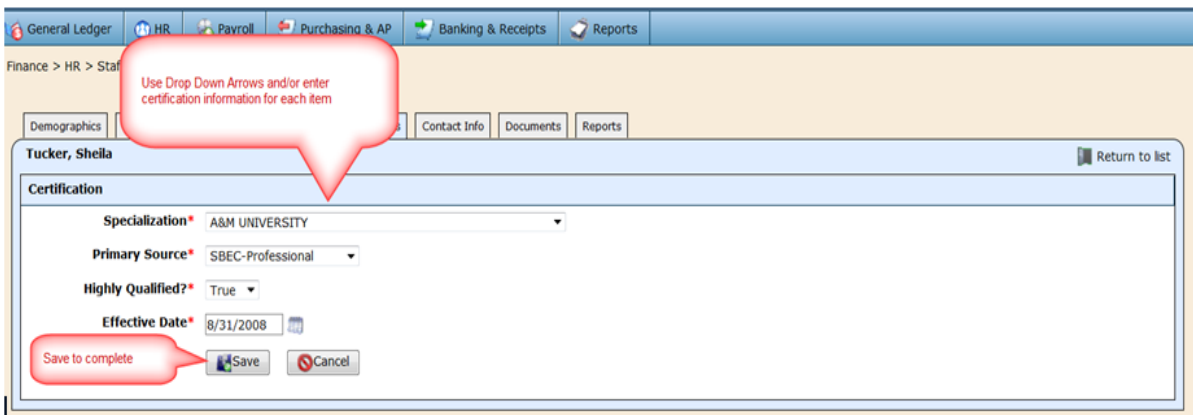
Page Size: 10 | Filter: Active Certifications

System ID	Specialization	Highly Qualified	Actions
No Certifications Found			

Records: 0 | Page 1 of 1

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

Click  **Save**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila

Return to list

Use Drop Down Arrows and/or enter certification information for each item

Specialization* A&M UNIVERSITY

Primary Source* SBEC-Professional

Highly Qualified?* True

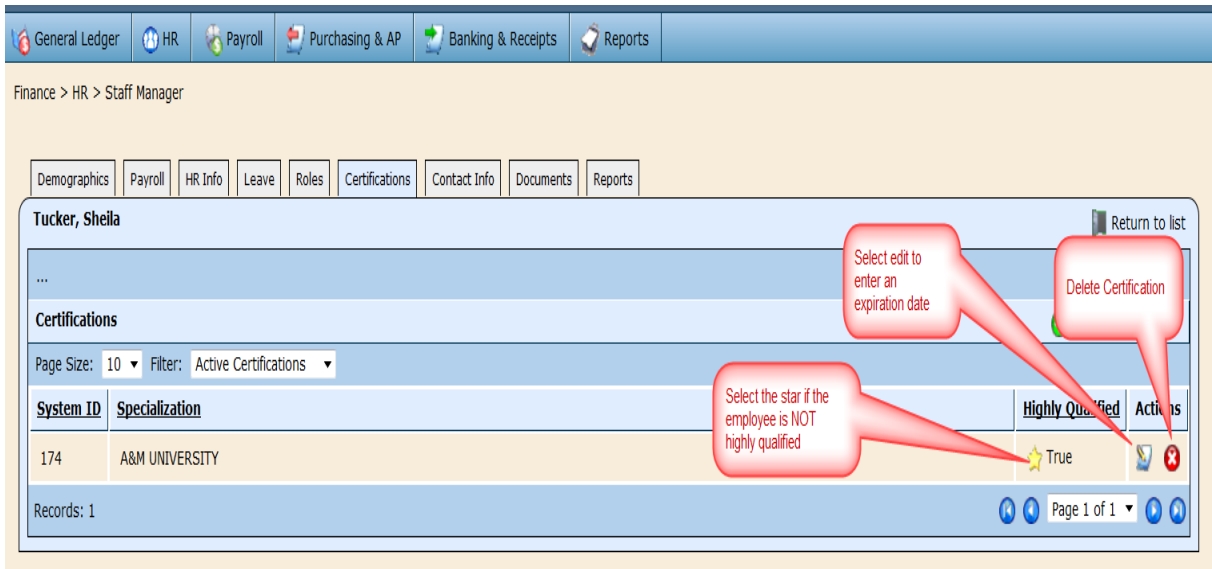
Effective Date* 8/31/2008

Save to complete Save Cancel

- **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.

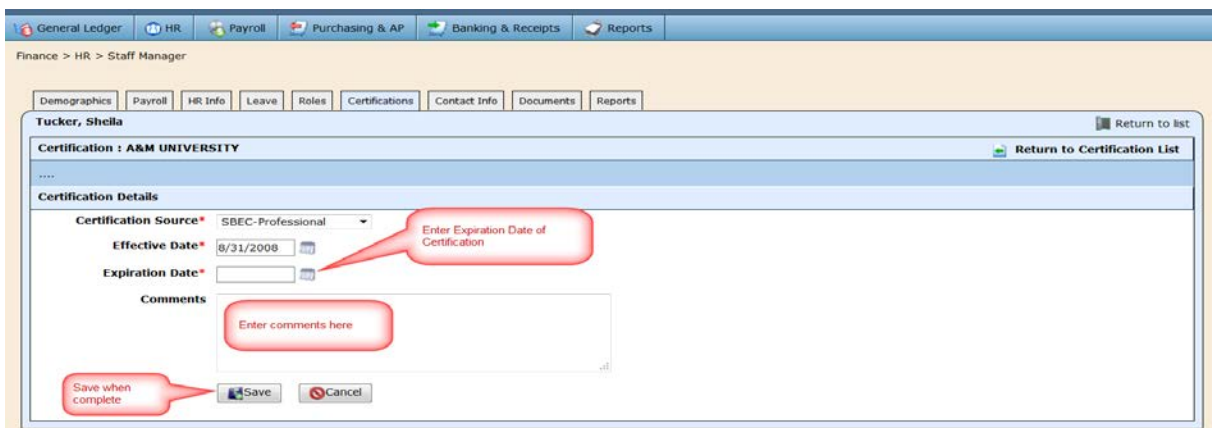
You will then see a summary screen.



- **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**



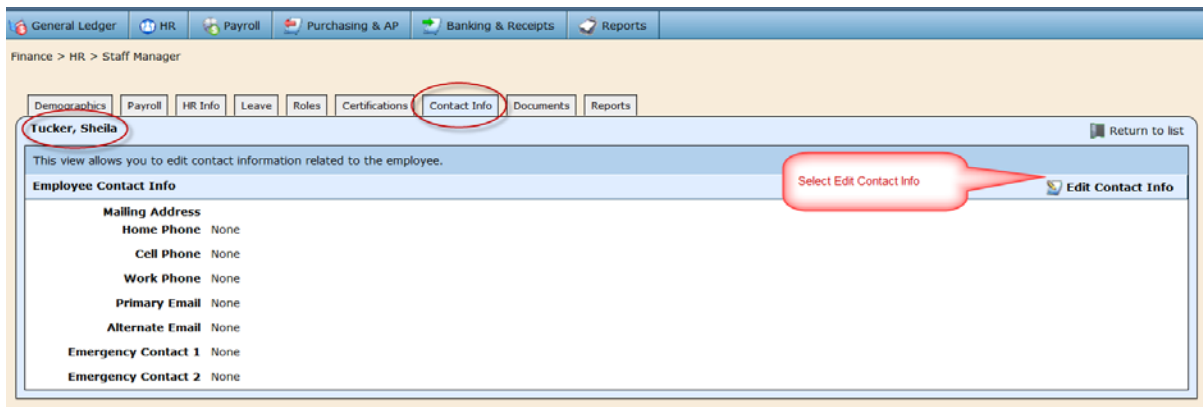
Step 7 – Contact Info

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**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

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

Employee Contact Info Select Edit Contact Info Edit Contact Info

Mailing Address

Home Phone None

Cell Phone None

Work Phone None

Primary Email None

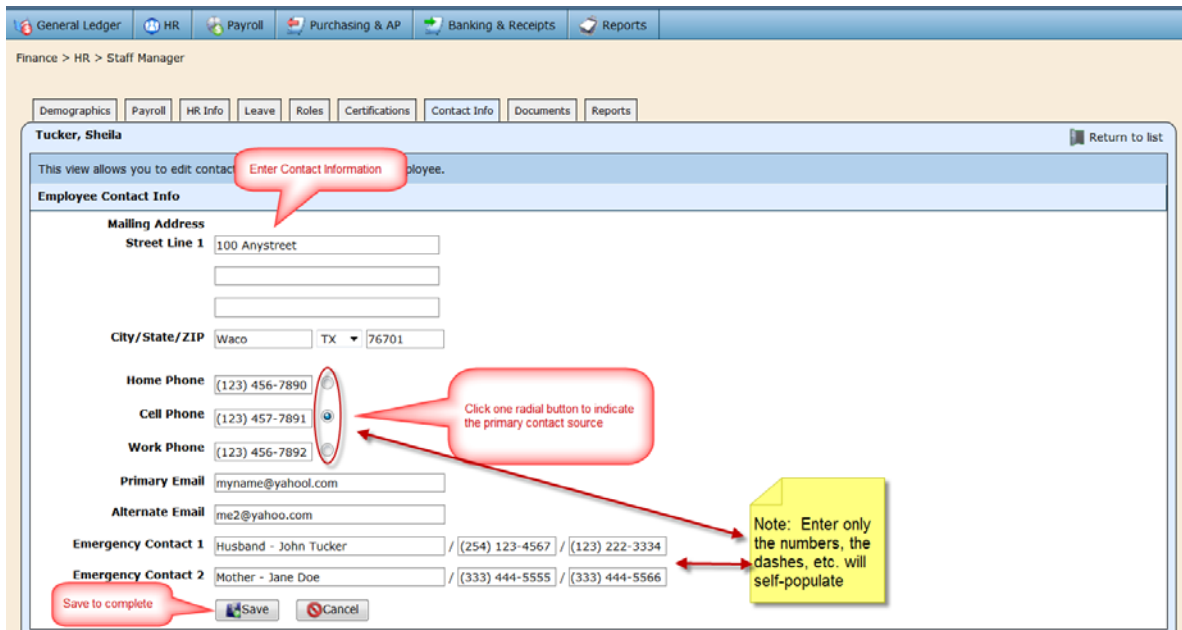
Alternate Email None

Emergency Contact 1 None

Emergency Contact 2 None

Enter all of the employee's contact information.

Click  **Save**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila Return to list

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

Employee Contact Info

Mailing Address

Street Line 1 100 Anystreet

City/State/ZIP Waco TX 76701

Home Phone (123) 456-7890

Cell Phone (123) 457-7891

Work Phone (123) 456-7892

Primary Email myname@yahoo.com

Alternate Email me2@yahoo.com

Emergency Contact 1 Husband - John Tucker / (254) 123-4567 / (123) 222-3334

Emergency Contact 2 Mother - Jane Doe / (333) 444-5555 / (333) 444-5566

Save to complete Save Cancel

Note: Enter only the numbers, the dashes, etc. will self-populate

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

The screenshot displays a web-based interface for managing employee information. At the top, there is a navigation bar with icons for General Ledger, HR, Payroll, Purchasing & AP, Banking & Receipts, and Reports. Below this, a breadcrumb trail reads "Finance > HR > Staff Manager". A secondary navigation bar contains tabs for Demographics, Payroll, HR Info, Leave, Roles, Certifications, Contact Info, Documents, and Reports. The "Contact Info" tab is selected, and the page title is "Tucker, Sheila". A "Return to list" link is visible in the top right corner. A blue banner below the title states, "This view allows you to edit contact information related to the employee." Below this banner is a section titled "Employee Contact Info" with an "Edit Contact Info" link. The contact information is as follows:

Mailing Address	100 Anystreet Waco, TX 76701
Home Phone	(123) 456-7890
Cell Phone	(123) 457-7891 *
Work Phone	(123) 456-7892
Primary Email	myname@yahoo.com
Alternate Email	me2@yahoo.com
Emergency Contact 1	Husband - John Tucker / (254) 123-4567 / (123) 222-3334
Emergency Contact 2	Mother - Jane Doe / (333) 444-5555 / (333) 444-5566

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.

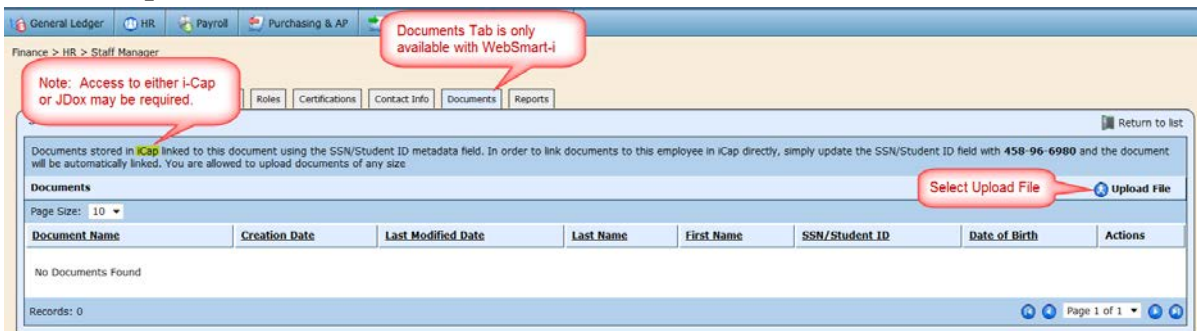
- Documents – if you have purchased WebSmart-*i*, you will see a Documents tab and have the ability to upload the personnel file here.
- You are allowed to upload documents of any size.

Adding Documents

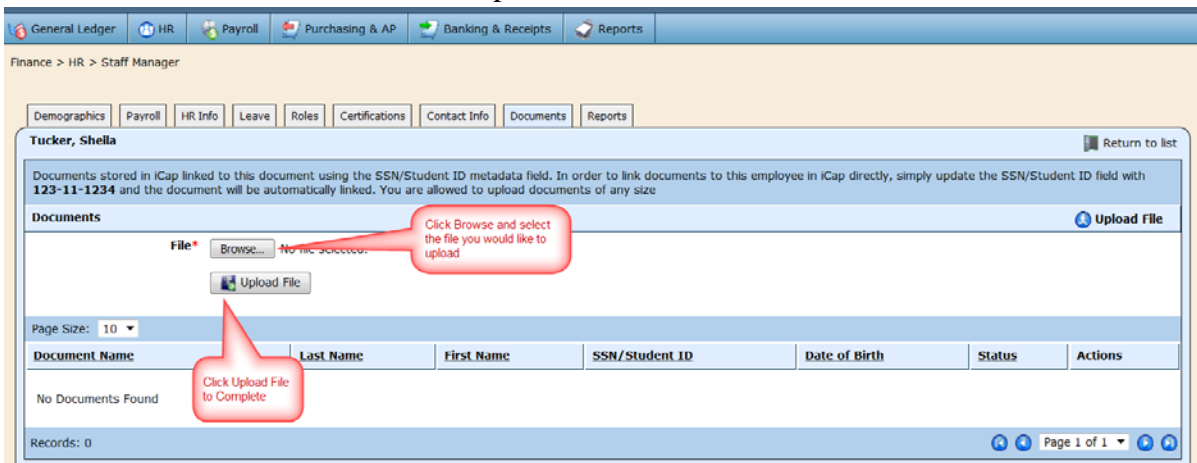
Finance > **HR** > **Staff Manager** > Documents Tab

***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**

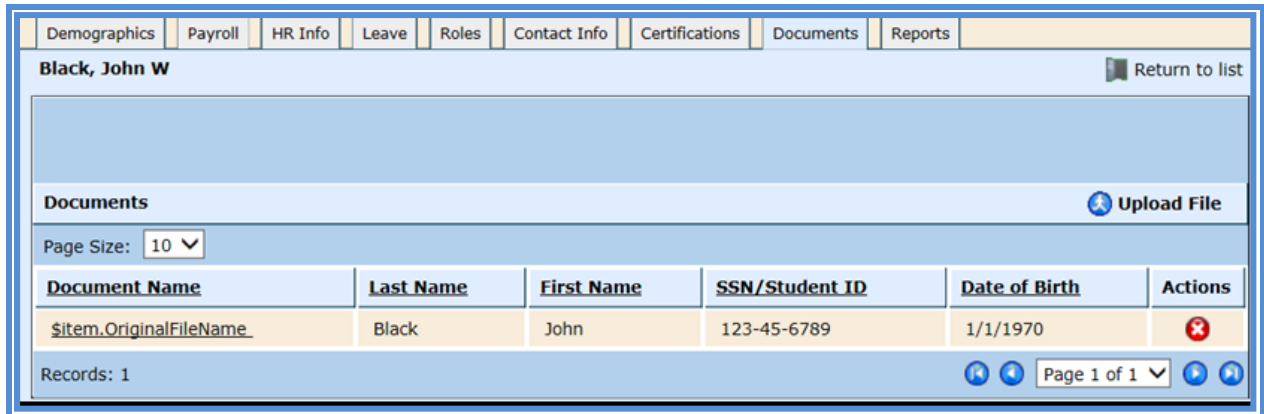


Click **Browse...** to find the document to upload.



Click 

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




Demographics Payroll HR Info Leave Roles Contact Info Certifications Documents Reports

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

Documents [Upload File](#)

Page Size: 10

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

Records: 1 [Previous](#) [Next](#) Page 1 of 1 [Previous](#) [Next](#)

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.

Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Tucker, Sheila

Report* Employee Leave

- Employee Leave
- Employee Payroll Preview
- Leave Forms
- Service Record Labels
- Service Records
- Service Records - Detail
- Staff Certifications

Parameters

Display

Instructional Period

Active Only?

Mask SSN?

Export Data To Excel

Run Report

Select  **Run Report**

Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Report* Employee Leave

Parameters

Display Summary of Balances

Instructional Period 2016-2017 School Year

Active Only?

Mask SSN?

Export Data To Excel

Run Report to Start

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.

LineType	Employee StaffName	SSN	ContractB	ContractE	LeaveType	LeaveType	UnitsCarri	UnitsAccn	UnitsUsed	UnitsGraci	UnitsRedu	UnitsFullDr	UnitsAvail	DockOnOr	ContractM	ContractY	LeaveTran	PayrollBat	Comments
Detail	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			BEREAVE		0	8	0	0	0	0	0	#####	4	2015	Standard	0	Death of immedi
Total	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			BEREAVE		0	8	0	0	0	0	0						0
Detail	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			JURY DUT		8	0	0	0	0	0	0				0	Adjustmen	0
Total	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			JURY DUT		5	8	0	0	0	0	13						0
Detail	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			SCHOOL I		5	0	0	0	0	0	0				0	Adjustmen	0
Total	2380 Tucker, Si	***-**-123-09/01/2011:05/31/2011			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

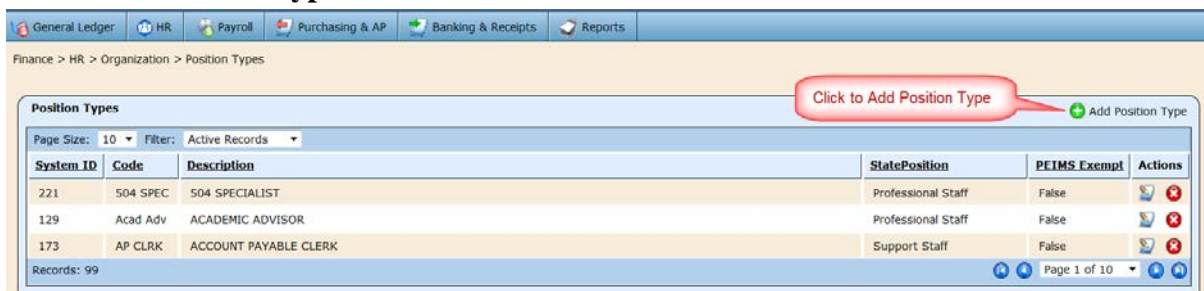
A position type maps a state-defined TRS position to a locally implemented position type. This categorization is critical to the following areas:

- ✓ 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**



Click to Add Position Type

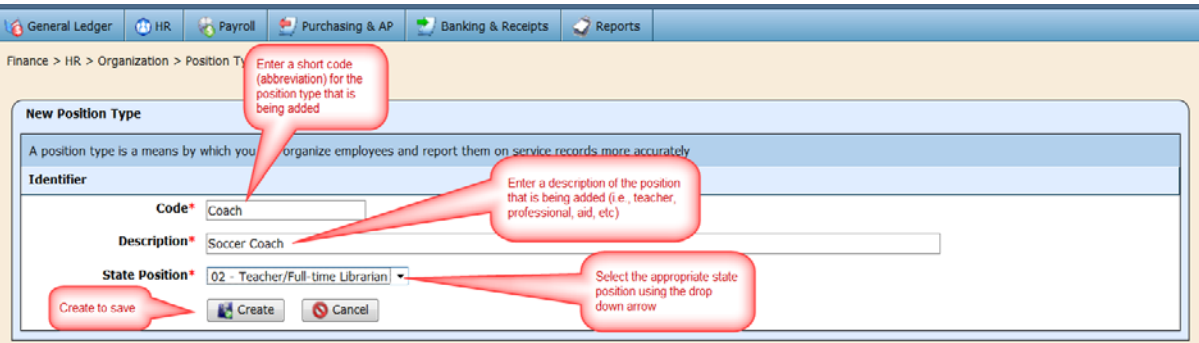
System ID	Code	Description	State Position	PEIMS Exempt	Actions
221	504 SPEC	504 SPECIALIST	Professional Staff	False	 
129	Acad Adv	ACADEMIC ADVISOR	Professional Staff	False	 
173	AP CLRK	ACCOUNT PAYABLE CLERK	Support Staff	False	 

Records: 99 Page 1 of 10

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

Enter all of the information.

Click  **Create**



Finance > HR > Organization > Position Types

New Position Type

A position type is a means by which you can organize employees and report them on service records more accurately.

Identifier

Code* Coach

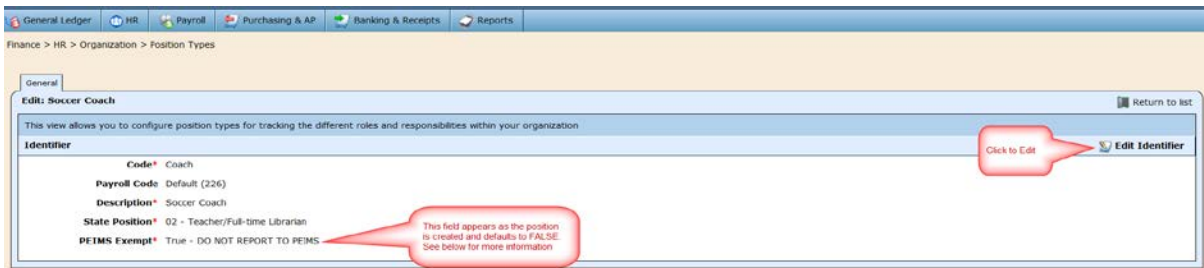
Description* Soccer Coach

State Position* 02 - Teacher/Full-time Librarian

Create to save Create Cancel

- **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.



Finance > HR > Organization > Position Types

Edit: Soccer Coach

This view allows you to configure position types for tracking the different roles and responsibilities within your organization.

Identifier

Code* Coach

Payroll Code Default (226)

Description* Soccer Coach

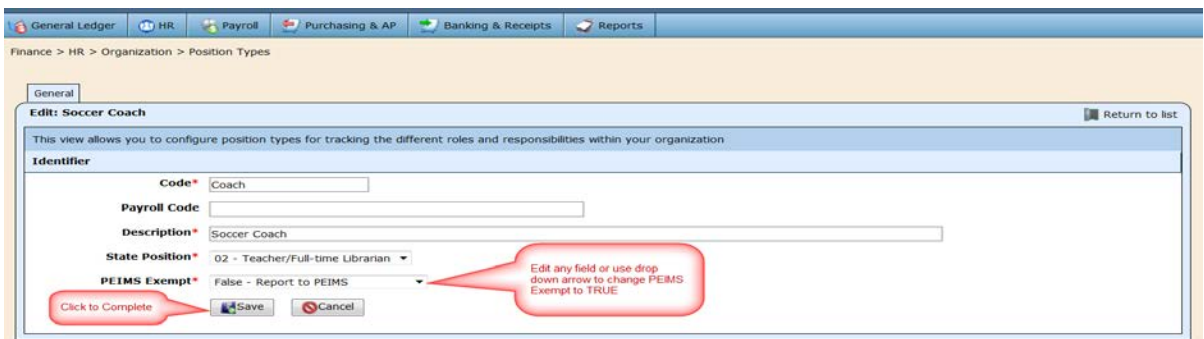
State Position* 02 - Teacher/Full-time Librarian

PEIMS Exempt* True - DO NOT REPORT TO PEIMS

Click to Edit Edit Identifier

** **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**



Finance > HR > Organization > Position Types

Edit: Soccer Coach

This view allows you to configure position types for tracking the different roles and responsibilities within your organization.

Identifier

Code* Coach

Payroll Code

Description* Soccer Coach

State Position* 02 - Teacher/Full-time Librarian

PEIMS Exempt* False - Report to PEIMS

Click to Complete Save Cancel

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

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

General

Edit: Soccer Coach Return to list

This view allows you to configure position types for tracking the different roles and responsibilities within your organization

Identifier Edit Identifier

Code* Coach

Payroll Code Default (226)

Description* Soccer Coach

State Position* 02 - Teacher/Full-time Librarian


PEIMS Exempt* True - DO NOT REPORT TO PEIMS

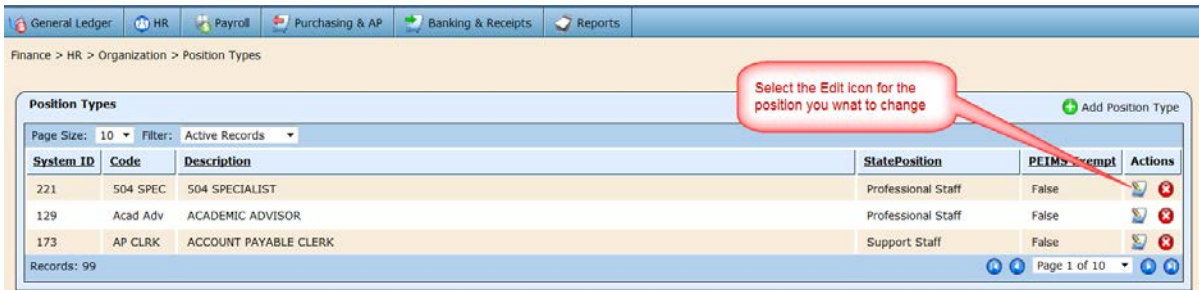
Status has changed to TRUE

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.









General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

Position Types Add Position Type

Page Size: 10 | Filter: Active Records

System ID	Code	Description	State Position	PEIMS Exempt	Actions
221	504 SPEC	504 SPECIALIST	Professional Staff	False	 
129	Acad Adv	ACADEMIC ADVISOR	Professional Staff	False	 
173	AP CLRK	ACCOUNT PAYABLE CLERK	Support Staff	False	 

Records: 99 | Page 1 of 10

Select the Edit icon for the position you want to change

Click  **Edit Identifier**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

General

Edit: ASSISTANT CNP SUPERVISOR Return to list

This view allows you to configure position types for tracking the different roles and responsibilities within your organization

Identifier Edit Identifier

Code* None

Payroll Code 16

Description* ASSISTANT CNP SUPERVISOR

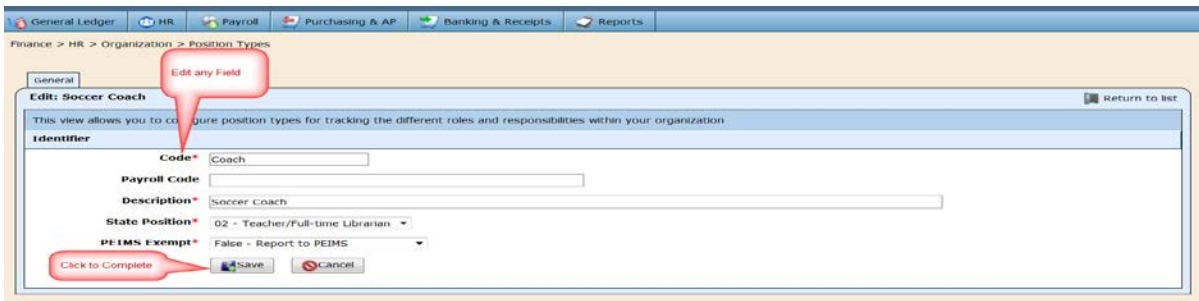
State Position* 01 - Professional Staff

PEIMS Exempt* False - Report to PEIMS

Click to edit the position information

Correct the appropriate fields.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

General

Edit: Soccer Coach Return to list

This view allows you to configure position types for tracking the different roles and responsibilities within your organization.

Identifier

Code* Coach

Payroll Code

Description* Soccer Coach

State Position* 02 - Teacher/Full-time Librarian

PEIMS Exempt* False - Report to PEIMS


Click to Complete Save Cancel

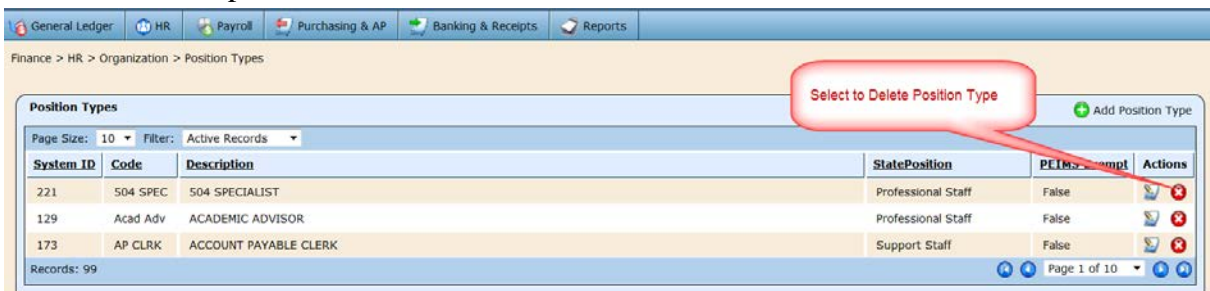
Edit any Field

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.






General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

Position Types Add Position Type

Page Size: 10 Filter: Active Records

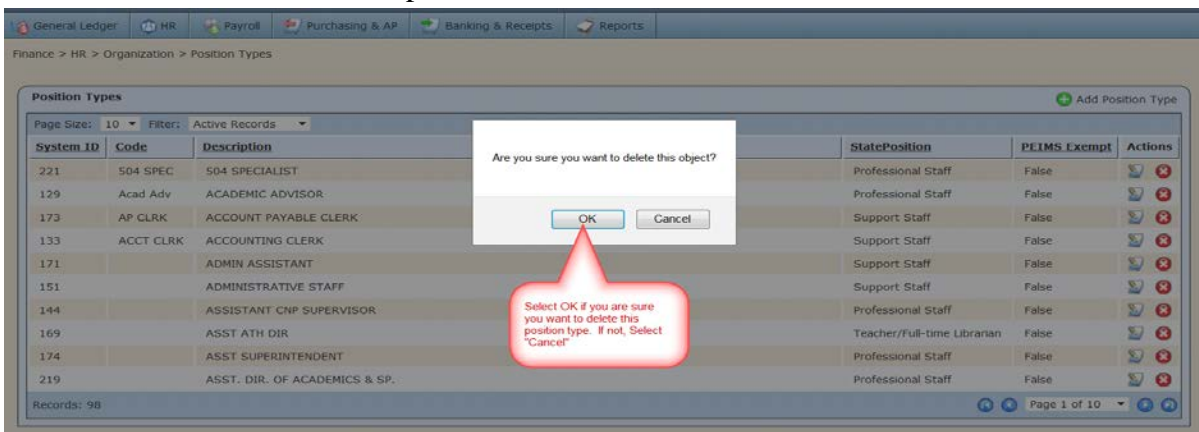
System ID	Code	Description	StatePosition	PEIMS Exempt	Actions
221	504 SPEC	504 SPECIALIST	Professional Staff	False	
129	Acad Adv	ACADEMIC ADVISOR	Professional Staff	False	
173	AP CLRK	ACCOUNT PAYABLE CLERK	Support Staff	False	

Records: 99 Page 1 of 10

Select to Delete Position Type

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

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













General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

Position Types Add Position Type

Page Size: 10 Filter: Active Records

System ID	Code	Description	StatePosition	PEIMS Exempt	Actions
221	504 SPEC	504 SPECIALIST	Professional Staff	False	
129	Acad Adv	ACADEMIC ADVISOR	Professional Staff	False	
173	AP CLRK	ACCOUNT PAYABLE CLERK	Support Staff	False	
133	ACCT CLRK	ACCOUNTING CLERK	Support Staff	False	
171		ADMIN ASSISTANT	Support Staff	False	
151		ADMINISTRATIVE STAFF	Support Staff	False	
144		ASSISTANT CNP SUPERVISOR	Professional Staff	False	
169		ASST ATH DIR	Teacher/Full-time Librarian	False	
174		ASST SUPERINTENDENT	Professional Staff	False	
219		ASST. DIR. OF ACADEMICS & SP.	Professional Staff	False	

Records: 98 Page 1 of 10

Are you sure you want to delete this object?

OK Cancel

Select OK if you are sure you want to delete this position type. If not, Select "Cancel"

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 active records to disabled records. If this position was deleted in error, follow the following steps to restore the position.

Active Records

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

Position Types + Add Position Type

Page Size: 10 Filter: Active Records

System ID	Code	Description	StatePosition	PEIMS Exempt	Actions
221	504 SPEC	504 SPECIALIST	Professional Staff	False	
129	Acad Adv	ACADEMIC ADVISOR	Professional Staff	False	
173	AP CLRK	ACCOUNT PAYABLE CLERK	Support Staff	False	
133	ACCT CLRK	ACCOUNTING CLERK	Support Staff	False	
171		ADMIN ASSISTANT	Support Staff	False	
151		ADMINISTRATIVE STAFF	Support Staff	False	
144		ASSISTANT CNP SUPERVISOR	Professional Staff	False	
169		ASST ATH DIR	Teacher/Full-time Librarian	False	
174		ASST SUPERINTENDENT	Professional Staff	False	
219		ASST. DIR. OF ACADEMICS & SP.	Professional Staff	False	

Records: 98 Page 1 of 10

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

Disabled Records

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Position Types

Position Types + Add Position Type

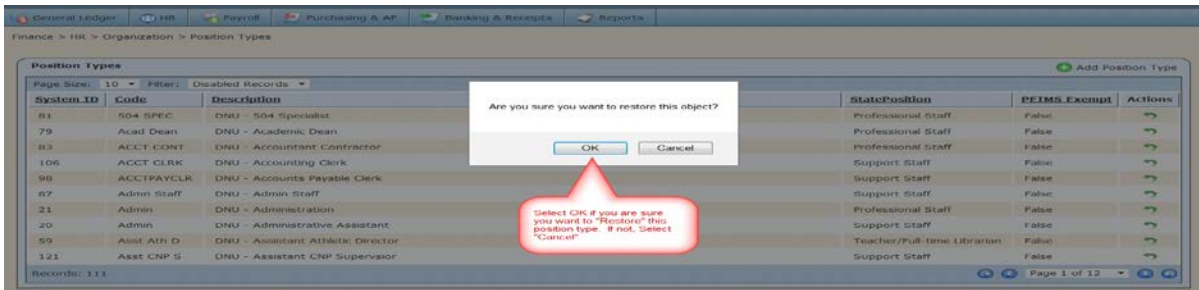
Page Size: 10 Filter: Disabled Records

System ID	Code	Description	StatePosition	PEIMS Exempt	Actions
81	504 SPEC	DNU - 504 Specialist	Professional Staff	False	
79	Acad Dean	DNU - Academic Dean	Professional Staff	False	
83	ACCT CONT	DNU - Accountant Contractor	Professional Staff	False	
106	ACCT CLRK	DNU - Accounting Clerk	Professional Staff	False	
98	ACCTPAYCLR	DNU - Accounts Payable Clerk	Support Staff	False	
87	Admin Staff	DNU - Admin Staff	Support Staff	False	
21	Admin	DNU - Administration	Professional Staff	False	
20	Admin	DNU - Administrative Assistant	Support Staff	False	
59	Asst Ath D	DNU - Assistant Athletic Director	Teacher/Full-time Librarian	False	
121	Asst CNP S	DNU - Assistant CNP Supervisor	Support Staff	False	

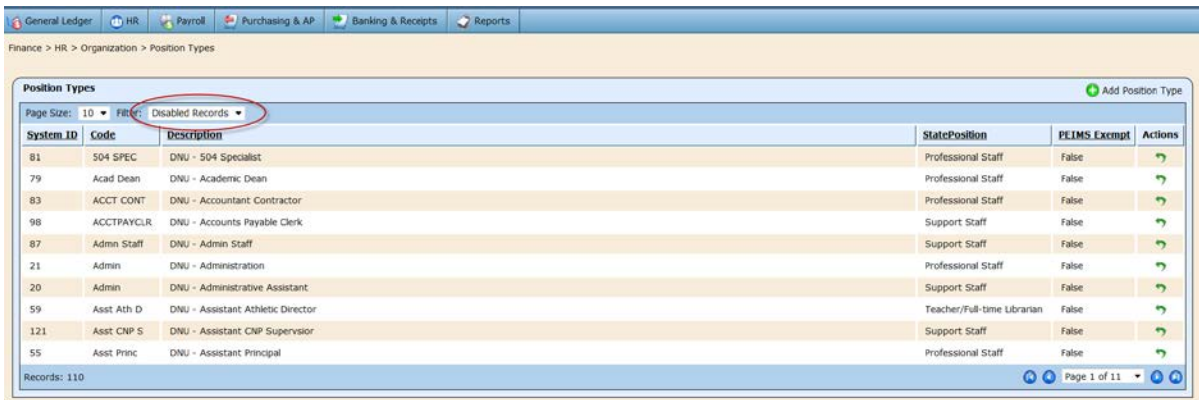
Records: 111 Page 1 of 12

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.

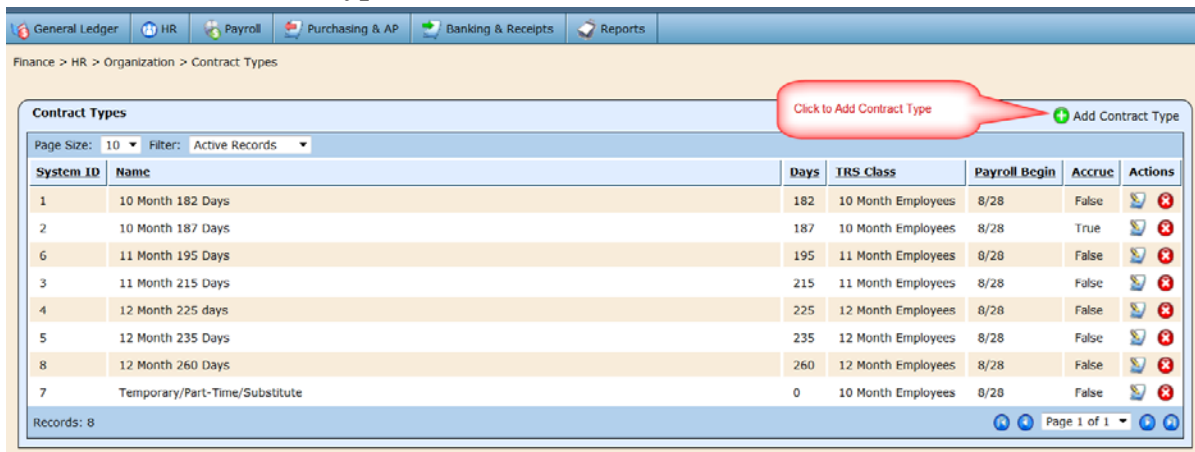
Contract Types

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



Contract Types

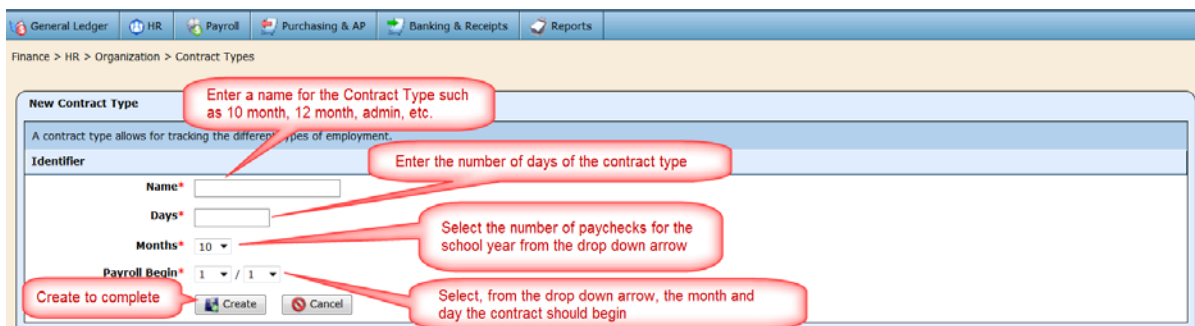
Page Size: 10 Filter: Active Records

System ID	Name	Days	IRS Class	Payroll Begin	Accrue	Actions
1	10 Month 182 Days	182	10 Month Employees	8/28	False	
2	10 Month 187 Days	187	10 Month Employees	8/28	True	
6	11 Month 195 Days	195	11 Month Employees	8/28	False	
3	11 Month 215 Days	215	11 Month Employees	8/28	False	
4	12 Month 225 days	225	12 Month Employees	8/28	False	
5	12 Month 235 Days	235	12 Month Employees	8/28	False	
8	12 Month 260 Days	260	12 Month Employees	8/28	False	
7	Temporary/Part-Time/Substitute	0	10 Month Employees	8/28	False	

Records: 8 Page 1 of 1

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

Click  Create



New Contract Type

A contract type allows for tracking the different types of employment.

Identifier

Name*

Days*

Months 10

Payroll Begin 1 / 1

Create to complete

Finance > HR > Organization > Contract Type

New Contract Type

A contract type allows for tracking the different types of employment.

Identifier

Name*

Days*

Months* 10

Payroll Begin* 1 / 1

- **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** – Select 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**

Finance > HR > Organization > Contract Types

Edit: Maint Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.

Identifier

Name* Maint

Days* 222

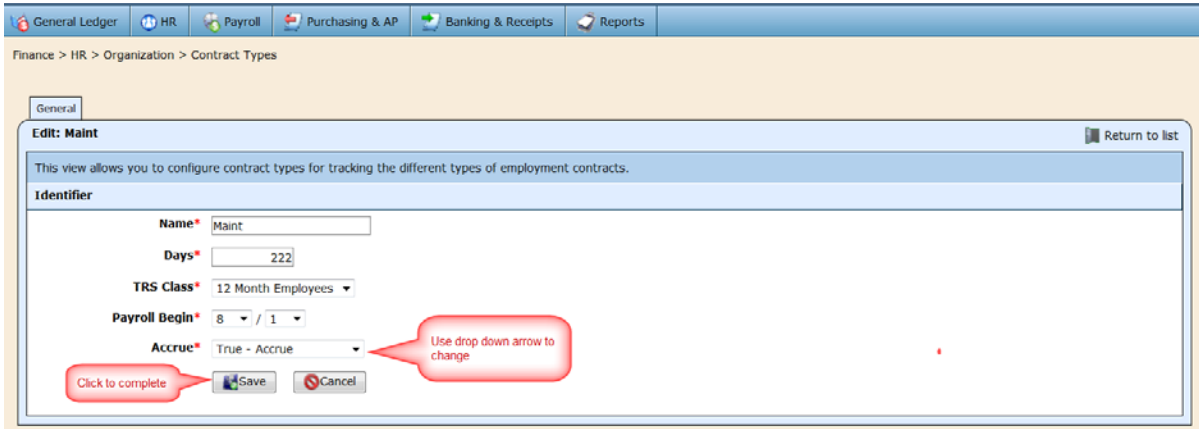
TRS Class* 12 Month Employees

Payroll Begin* 8/1

Accrue* False - Do NOT Accrue

Make necessary changes.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Contract Types

General

Edit: Maint Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.

Identifier

Name* Maint

Days* 222

TRS Class* 12 Month Employees

Payroll Begin* 8 / 1

Accrue* True - Accrue

Click to complete Save Cancel

Use drop down arrow to change

Verify the changes on the Summary Screen.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Contract Types

General

Edit: 12 Month 225 days Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.

Identifier Edit Identifier

Name* 12 Month 225 days

Days* 225

TRS Class* 12 Month Employees


Payroll Begin* 8/28

Accrue* True - Accrue

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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Contract Types

Contract Types Add Contract Type

Page Size: 10 Filter: Active Records

System ID	Name	Days	TRS Class	Payroll Begin	Accrue	Actions
1	10 Month 182 Days	182	10 Month Employees	8/28	False	 
2	10 Month 187 Days	187	10 Month Employees	8/28	True	 
6	11 Month 195 Days	195	11 Month Employees	8/28	False	 
3	11 Month 215 Days	215	11 Month Employees	8/28	False	 
4	12 Month 225 days	225	12 Month Employees	8/28	False	 
5	12 Month 235 Days	235	12 Month Employees	8/28	False	 
8	12 Month 260 Days	260	12 Month Employees	8/28	False	 
7	Temporary/Part-Time/Substitute	0	10 Month Employees	8/28	False	 

Records: 8 Page 1 of 1

Click  **Edit Identifier**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Contract Types

General

Edit: Maint Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.

Identifier Click to Edit  Edit Identifier

Name* Maint
Days* 222
TRS Class* 12 Month Employees
Payroll Begin* 8/1
Accrue* False - Do NOT Accrue

Correct the appropriate fields.

Click  **Save**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Organization > Contract Types

General

Edit: Maint Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.

Identifier



Name* Maint

Days*

TRS Class* 12 Month Employees

Payroll Begin* 8 / 1

Accrue* False - Do NOT Accrue

Save to complete  Save  Cancel

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

Finance > HR > Organization > Contract Types

General

Edit: Maint Return to list

This view allows you to configure contract types for tracking the different types of employment contracts.


Identifier Edit Identifier

Name* Maint
Days* 222
TRS Class* 12 Month Employees
Payroll Begin* 8/1
Accrue* False - Do NOT Accrue

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.

Finance > HR > Organization > Contract Types

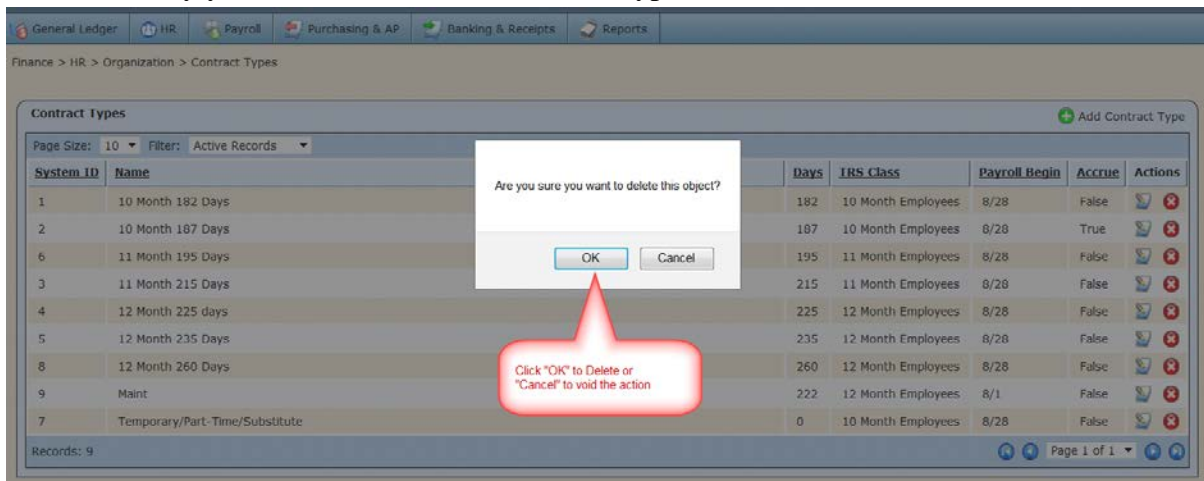
Contract Types Add Contract Type

Page Size: 10 Filter: Active Records

System ID	Name	Days	TRS Class	Payroll Begin	Accrue	Actions
1	10 Month 182 Days	182	10 Month Employees	8/28	False	
2	10 Month 187 Days	187	10 Month Employees	8/28	True	
6	11 Month 195 Days	195	11 Month Employees	8/28	False	
3	11 Month 215 Days	215	11 Month Employees	8/28	False	
4	12 Month 225 days	225	12 Month Employees	8/28	False	
5	12 Month 235 Days	235	12 Month Employees	8/28	False	
8	12 Month 260 Days	260	12 Month Employees	8/28	False	
9	Maint	222	12 Month Employees	8/1	False	
7	Temporary/Part-Time/Substitute	0	10 Month Employees	8/28	False	

Records: 9 Page 1 of 1

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.

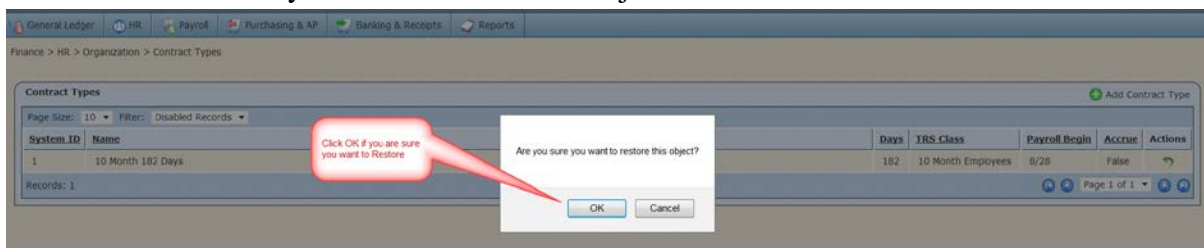
Finance > HR > Organization > Contract Types

Use Drop Down Arrow to select Disabled Records.

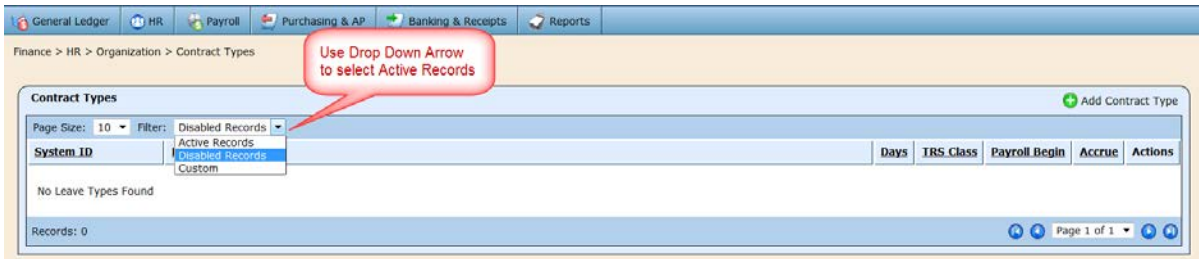
Click on  to restore to the Contract type.



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.

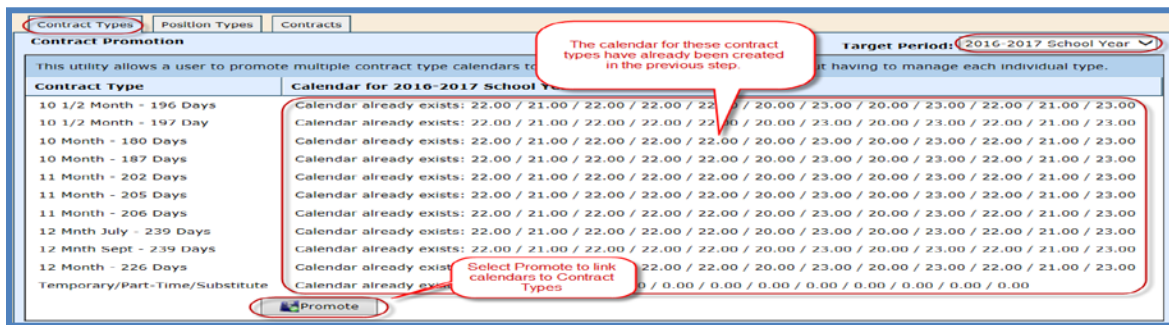
Step 1 - Promote Contract Types

Finance > HR > Organization > Promote Contract

Click on the Contract Types Tab.

Select the Target Period from the drop down menu.

Select  to Promote to link calendars to Contract Types

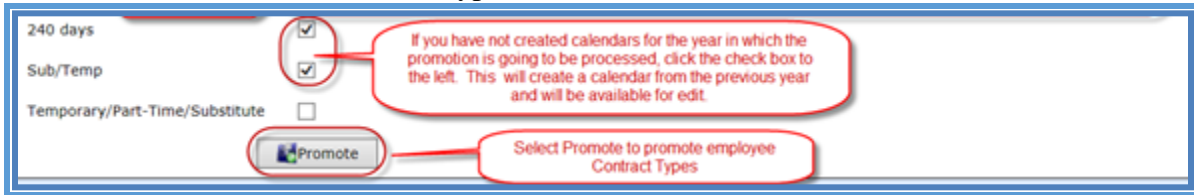


Calendar for 2016-2017 School Year –

- 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.

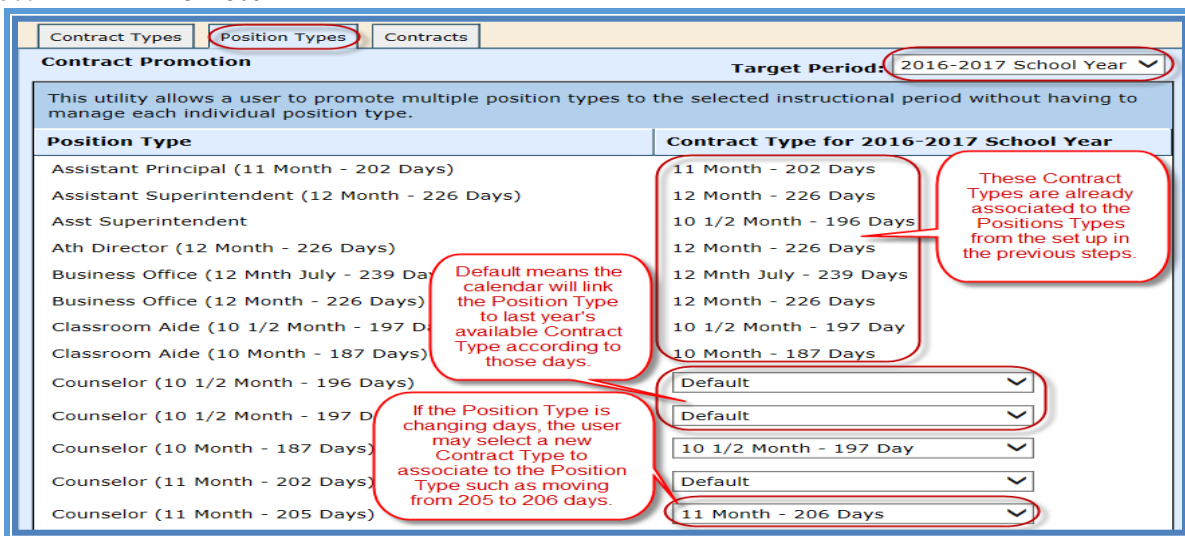
Step 2 - Promote Position Types

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 –

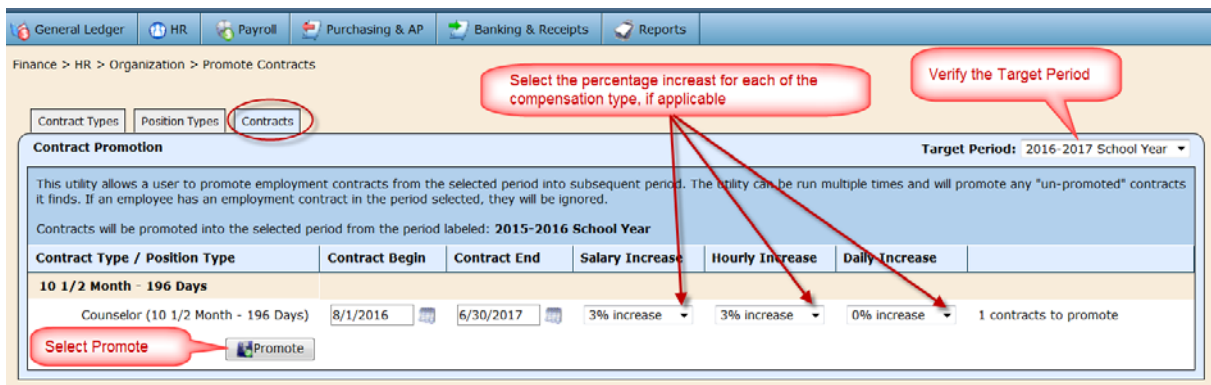
- The hours per day for the Position Types have already been created in the previous step and will pull into this tab.
- If the hours per day have not been set up for a particular Position Type, once the Promote button is clicked, this process will create a Contract Type from a previous year.

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.

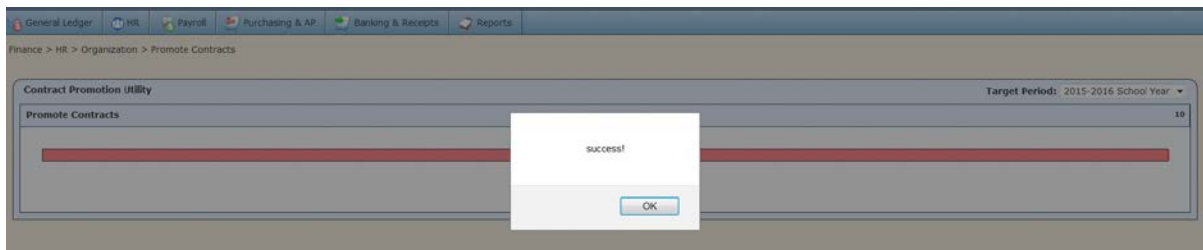
Select the **percentage increase** using the drop down arrows for each compensation type, if applicable.

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



Contract Type / Position Type	Contract Begin	Contract End	Salary Increase	Hourly Increase	Daily Increase	
10 1/2 Month - 196 Days						
Counselor (10 1/2 Month - 196 Days)	8/1/2016	6/30/2017	3% increase	3% increase	0% increase	1 contracts to promote

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 Types Position Types **Contracts** Select Contracts tab Select new year Target Period: 2016-2017 School Year

Contract Promotion

This utility allows a user to promote employment contracts from the selected period into subsequent period. The utility can be run multiple times and will promote any "un-promoted" contracts it finds. If an employee has an employment contract in the period selected, they will be ignored.

Contracts will be promoted into the selected period from the period labeled: **2015-2016 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.

Contract Type / Position Type	Contract Begin	Contract End
10 1/2 Month - 196 Days		
Counselor (10 1/2 Month - 196 Days)	1/2016	06/13/2017
10 1/2 Month - 197 Day		
Classroom Aide (10 1/2 Month - 197 Days)	1/2016	06/15/2017
Counselor (10 1/2 Month - 197 Days)	1/2016	06/30/2017
10 Month - 187 Days		
Classroom Aide (10 Month - 187 Days)	8/17/2016	6/5/2017
Food Service (10 Month - 187 Days)	8/17/2016	6/5/2017
Librarian (10 Month - 187 Days)	8/17/2016	6/5/2017
Librarian Aide (10 Month - 187 Days)	8/17/2016	6/5/2017

For each Contract Type there are a sub set of Position Types.
Enter the Contract Begin and End Dates for each of the Position Types.

- **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.

Contract Type / Position Type	Contract Begin	Contract End	Salary Increase	Hourly Increase	Daily Increase	
10 1/2 Month - 196 Days						
Counselor (10 1/2 Month - 196 Days)		2017	3% increase	0% increase	0% increase	1 contracts to promote
10 1/2 Month - 197 Day						
Classroom Aide (10 1/2 Month - 197 Day)			3% increase	0% increase	0% increase	1 contracts to promote
Counselor (10 1/2 Month - 197 Day)		2017	4% increase	0% increase	0% increase	1 contracts to promote
10 Month - 187 Days						
Classroom Aide (10 Month - 187 Days)	8/17/2016	6/5/2017	3% increase	0% increase	0% increase	24 contracts to promote
Food Service (10 Month - 187 Days)	8/17/2016	6/5/2017	Fixed amount 500.00	0% increase	0% increase	9 contracts to promote
Librarian (10 Month - 187 Days)	8/17/2016	6/5/2017	3% increase	0% increase	0% increase	1 contracts to promote
Librarian Aide (10 Month - 187 Days)	8/17/2016	6/5/2017	3% increase	0% increase	0% increase	3 contracts to promote

For each sub set of Position Types, the user may select a % Increase or Fixed Amount increase for Salary, Hourly and/or Daily amounts.

To the right of the increase section, the # of contracts anticipated to be promoted are anticipated.

- **Select Promote**

Temporary/Part-Time/Substitute						
Special Ed Testing (Temporary/Part-Time/Substitute)		2017	0% increase	0% increase	0% increase	3 contracts to promote
Substitute (Temporary/Part-Time/Substitute)		2017	0% increase	0% increase	0% increase	37 contracts to promote

Select Promote to promote contracts and positions for the new year.

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:

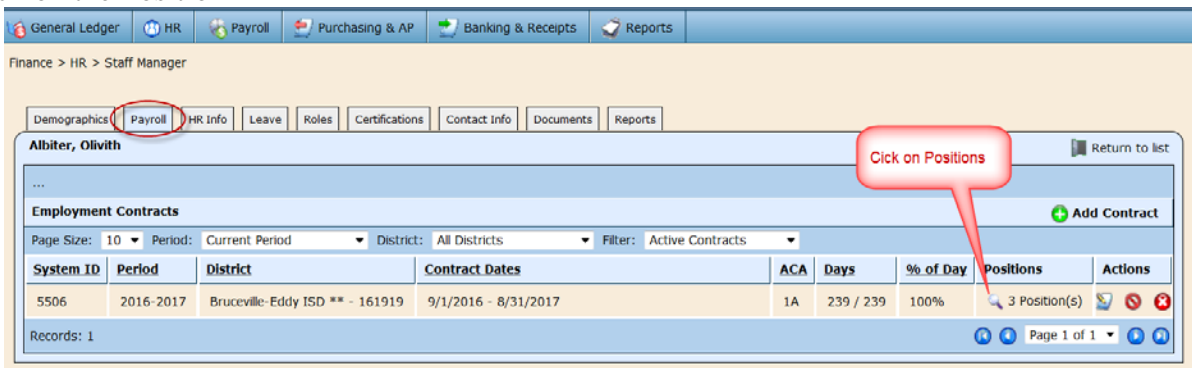
- Verify contracts for next year, update if necessary
- Verify positions for next year, update if necessary
- Run the Employee Wage Report and verify data
- Verify updated leave balances
- Update individual employee calendars (see more details below)
- Update the number of days per week the employee 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



Finance > HR > Staff Manager

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


Albiter, Olivith Return to list

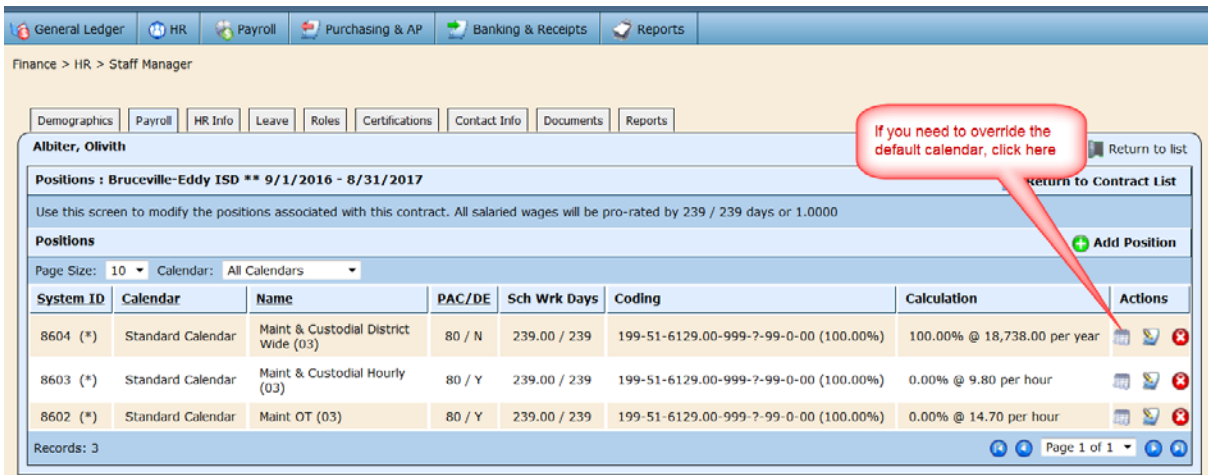
Employment Contracts + Add Contract

Page Size: 10 Period: Current Period District: All Districts Filter: Active Contracts

System ID	Period	District	Contract Dates	ACA	Days	% of Day	Positions	Actions
5506	2016-2017	Bruceville-Eddy ISD ** - 161919	9/1/2016 - 8/31/2017	1A	239 / 239	100%	3 Position(s)	

Records: 1 Page 1 of 1

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



Finance > HR > Staff Manager

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

Albiter, Olivith Return to list

Positions : Bruceville-Eddy ISD ** 9/1/2016 - 8/31/2017 Return to Contract List

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 239 / 239 days or 1.0000

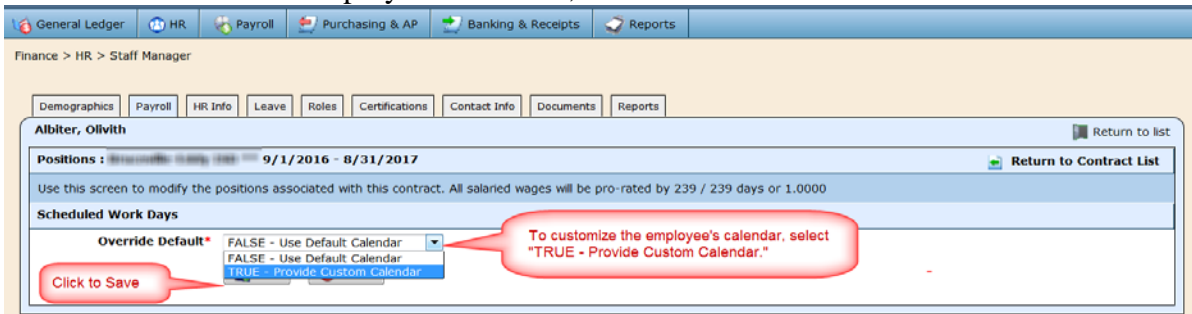
Positions + Add Position

Page Size: 10 Calendar: All Calendars

System ID	Calendar	Name	PAC/DE	Sch Wrk Days	Coding	Calculation	Actions
8604 (*)	Standard Calendar	Maint & Custodial District Wide (03)	80 / N	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	100.00% @ 18,738.00 per year	
8603 (*)	Standard Calendar	Maint & Custodial Hourly (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 9.80 per hour	
8602 (*)	Standard Calendar	Maint OT (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 14.70 per hour	

Records: 3 Page 1 of 1

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



Finance > HR > Staff Manager

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

Albiter, Olivith Return to list

Positions : Bruceville-Eddy ISD ** 9/1/2016 - 8/31/2017 Return to Contract List

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 239 / 239 days or 1.0000

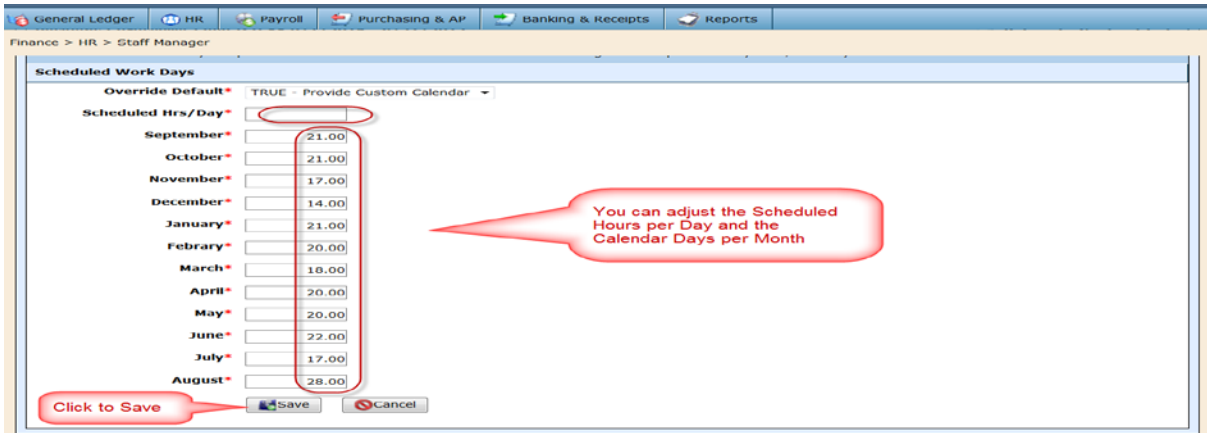
Scheduled Work Days

Override Default* FALSE - Use Default Calendar
FALSE - Use Default Calendar
TRUE - Provide Custom Calendar

Click to Save 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.





Finance > HR > Staff Manager

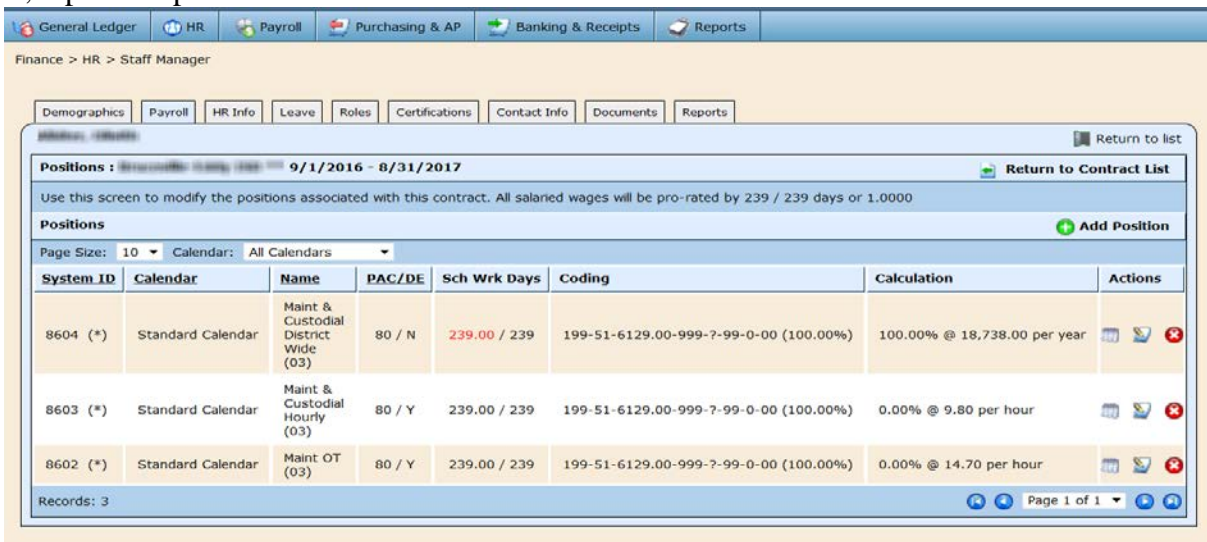
Scheduled Work Days

Override Default * TRUE - Provide Custom Calendar

Month	Scheduled Hrs/Day
September	21.00
October	21.00
November	17.00
December	14.00
January	21.00
February	20.00
March	18.00
April	20.00
May	20.00
June	22.00
July	17.00
August	28.00

Click to Save  

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












Finance > HR > Staff Manager

Demographics Payroll HR Info Leave Roles Certifications Contact Info Documents Reports

Positions : 9/1/2016 - 8/31/2017


Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 239 / 239 days or 1.0000

System ID	Calendar	Name	PAC/DE	Sch Wrk Days	Coding	Calculation	Actions
8604 (*)	Standard Calendar	Maint & Custodial District Wide (03)	80 / N	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	100.00% @ 18,738.00 per year	  
8603 (*)	Standard Calendar	Maint & Custodial Hourly (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 9.80 per hour	  
8602 (*)	Standard Calendar	Maint OT (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 14.70 per hour	  

Records: 3 Page 1 of 1

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

Finance > HR > Staff Manager

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

Albiter, Olivith Return to list

Employment Contracts Add Contract

Page Size: 10 Period: Current Period District: All Districts Filter: Active Contracts

System ID	Period	District	Contract Dates	ACA	Days	% of Day	Positions	Actions
5506	2016-2017	Bruceville-Eddy ISD ** - 161919	9/1/2016 - 8/31/2017	1A	239 / 239	100%	3 Position(s)	

Records: 1 Page 1 of 1

Click Edit

Finance > HR > Staff Manager

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

Albiter, Olivith Return to list

Positions : Bruceville-Eddy ISD ** 9/1/2016 - 8/31/2017 Return to Contract List

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 239 / 239 days or 1.0000

Positions Add Position

Page Size: 10 Calendar: All Calendars

System ID	Calendar	Name	PAC/DE	Sch Wrk Days	Coding	Calculation	Actions
8604 (*)	Standard Calendar	Maint & Custodial District Wide (03)	80 / N	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	100.00% @ 18,738.00 per year	
8603 (*)	Standard Calendar	Maint & Custodial Hourly (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 9.80 per hour	
8602 (*)	Standard Calendar	Maint OT (03)	80 / Y	239.00 / 239	199-51-6129.00-999-7-99-0-00 (100.00%)	0.00% @ 14.70 per hour	

Records: 3 Page 1 of 1

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

Finance > HR > Staff Manager

Positions : Bruceville-Eddy ISD ** 9/1/2016 - 8/31/2017 Return to Contract List

Use this screen to modify the positions associated with this contract. All salaried wages will be pro-rated by 239 / 239 days or 1.0000

Position Details

Payroll Calendar* Standard Calendar

Name* Maint & Custodial Hourly

Position Type* Maintenance & Custodial (12 Mnth Sept - 239 Days) [03]

Payroll Activity Code* 80 - Base Salary

WC Category* Other - Food Svc & Maint

Allocation* 0.00 5 Days/Week

Compensation Type* Hourly

Rate* 9.80

Encumbrance* Calculated

Coding Allocations* 1

Coding Allocation 1* 199-51-6129-00-999-?-99-0-00 100.00

Overtime Object* None

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.

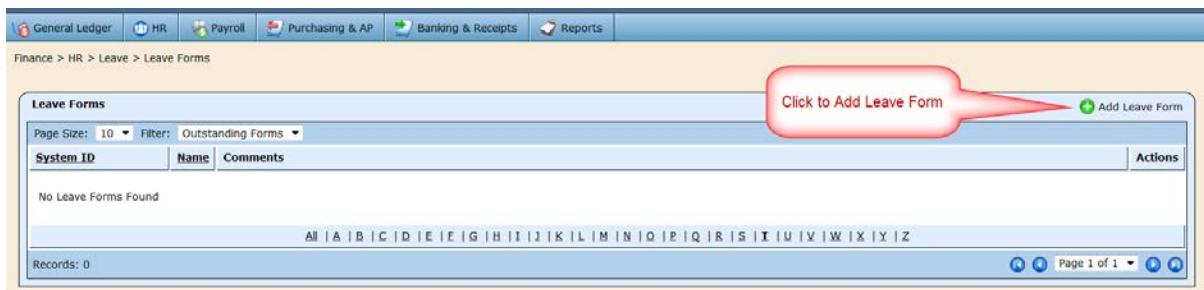
Leave Forms

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

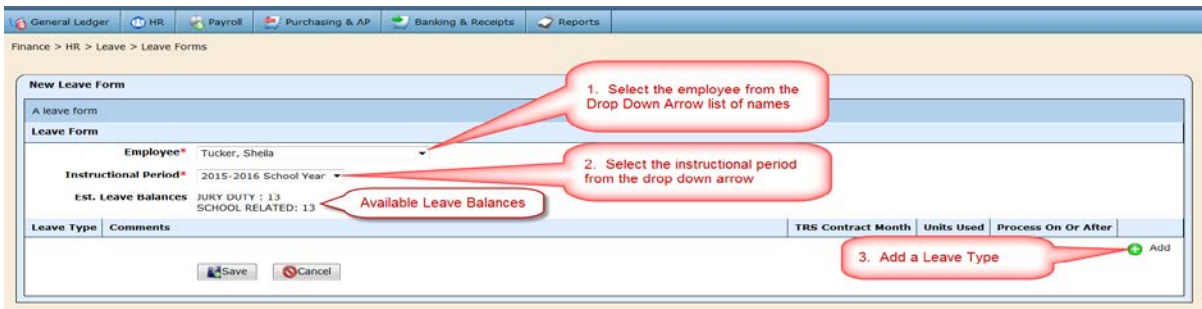
Finance > HR > Leave > Leave Forms

Click  **Add Leave Form**



Enter the information in each field shown below.

Click on  Add

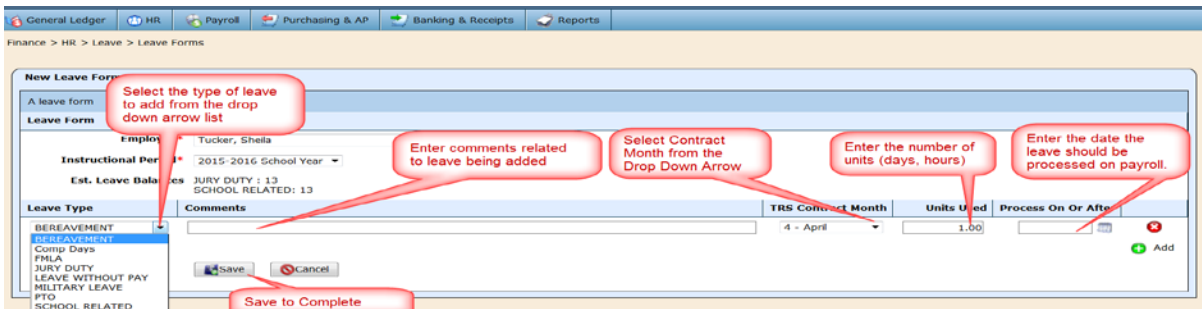


The screenshot shows the 'New Leave Form' interface. The 'Employee' field is set to 'Tucker, Sheila' and the 'Instructional Period' is '2015-2016 School Year'. The 'Est. Leave Balances' section shows 'JURY DUTY : 13' and 'SCHOOL RELATED: 13'. The 'Leave Type' field is empty. The 'Comments' field is also empty. The 'TRIS Contract Month' is '4 - April', 'Units Used' is '1.00', and 'Process On Or After' is empty. The 'Add' button is highlighted with a callout.

- **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



The screenshot shows the 'New Leave Form' interface with the 'Leave Type' dropdown menu open. The dropdown menu lists various leave types: BEREAVEMENT, BEREAVEMENT, Comp Days, FMLA, JURY DUTY, LEAVE WITHOUT PAY, MILITARY LEAVE, PTO, and SCHOOL RELATED. The 'Comments' field is filled with 'Enter comments related to leave being added'. The 'TRIS Contract Month' is '4 - April', 'Units Used' is '1.00', and 'Process On Or After' is empty. The 'Save' button is highlighted with a callout.

- **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.

Finance > HR > Leave > Leave Forms

LeaveForm

Edit: Return to list

A leave form

Leave Form

Employee* Tucker, Sheila

Instructional Period* 2015-2016 School Year

Leave Type	Comments	TRS Contract Month	Units Used	Process On Or After
BEREAVEMENT	Death of immediate family member	4 - April	8.00	5/1/2016


Callouts:
 - The leave will be applied to the employee selected (points to Employee*)
 - Instructional Period (points to Instructional Period*)
 - Leave Type and comments will be shown (points to Leave Type and Comments)
 - Summary of leave and when to process (points to the table)

**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.

Finance > HR > Leave > Leave Forms

Leave Forms

Page Size: 10 Filters: Outstanding Form

System ID	Name	Comments	Actions
2	Tucker, Sheila		

Records: 1

Callouts:
 - Select the appropriate employee (points to Tucker, Sheila)
 - Click on the Edit Button (points to the edit icon)

Click  **Edit Leave Form**

Finance > HR > Leave > Leave Forms

LeaveForm

Edit: Return to list

A leave form

Leave Form

Employee* Tucker, Sheila

Instructional Period* 2015-2016 School Year

Leave Type	Comments	TRS Contract Month	Units Used	Process On Or After
FMLA	Family Medical Leave	4 - April	8.00	5/1/2016

Callout:
 - Click Edit Leave Form (points to the Edit Leave Form button)

Edit any of the fields at the bottom section.

Click  Save

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Forms

LeaveForm

Edit: Return to list

A leave form

Leave Form

Employee* Tucker, Sheila

Instructional Period* 2015-2016 School Year

Est. Leave Balances BEREAVEMENT: 0
FMLA: 0
JURY DUTY: 13
SCHOOL RELATED: 13

Leave Type	Comments	TRS Contract Month	Units Used	Process On Or After
FMLA	Family Medical Leave	4 - April	0.00	5/1/2016

Save to Complete

You may add a Leave Type

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Forms

LeaveForm

Edit: Return to list

A leave form

Leave Form Edit Leave Form

Employee* Tucker, Sheila


Instructional Period* 2015-2016 School Year

Leave Type	Comments	TRS Contract Month	Units Used	Process On Or After
FMLA	Family Medical Leave	4 - April	8.00	5/1/2016

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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Forms

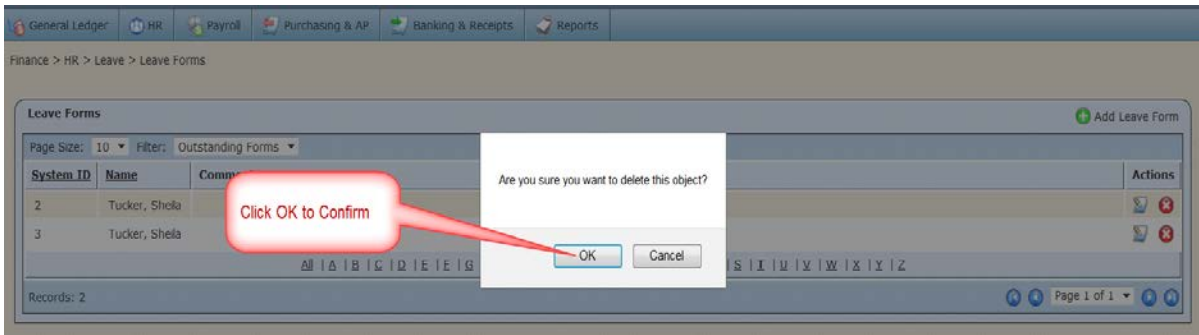
Leave Forms Add Leave Form

Page Size: 10 Filter: Outstanding

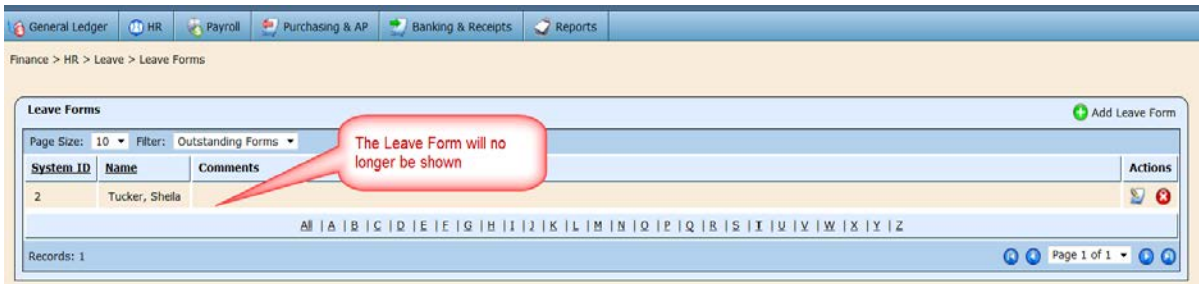
System ID	Name	Comments	Actions
2	Tucker, Sheila		
3	Tucker, Sheila		

Records: 2 Page 1 of 1

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



The leave will no longer be shown.



Leave Types

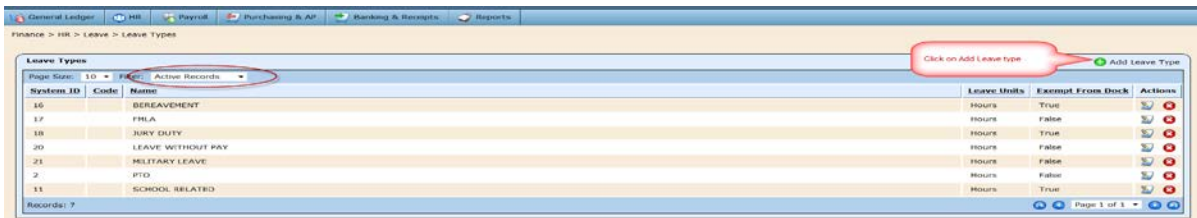
Leave Types are created to serve the following functions:

- 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

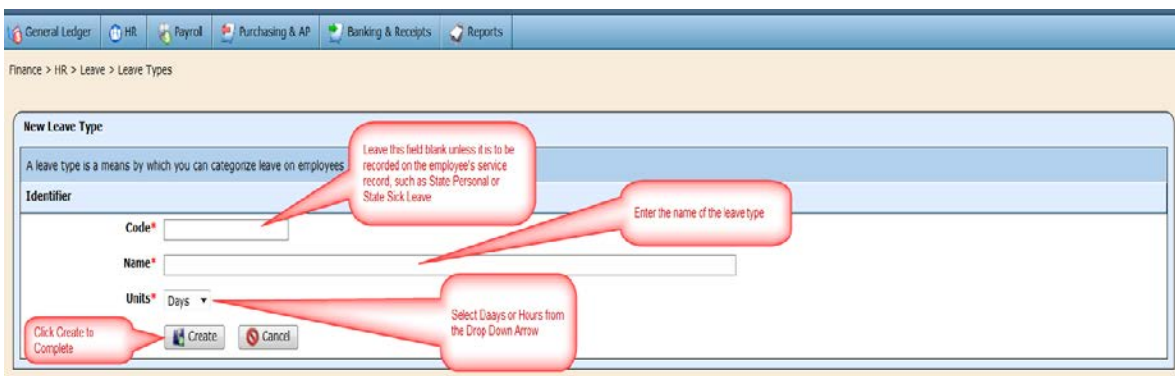
Finance > HR > Leave > Leave Types

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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier Edit Identifier

Code* Comp
 Name* Comp Days
 Units* Days
 Exempt From Dock* False - Dock in accordance with employee policy

This field appears as the leave type is created. It will default to FALSE - Dock in accordance with Employee Policy. If this leave type should NOT dock, follow the next steps to Edit

****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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier Edit Identifier

Code* Comp
 Name* Comp Days
 Units* Days
 Exempt From Dock* False - Dock in accordance with employee policy

Click on Edit Identifier to change the Exemption from False to True or to make other changes to the Identifier

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

Click on **Save**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier

Code* Comp
 Name* Comp Days
 Units* Days
 Exempt From Dock* True - DO NOT DOCK

Use Drop Down Arrow to change Exemption to TRUE

Save to Complete | Save | Cancel

Verify the Exemption has changed to True.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier Edit Identifier

Code* Comp
Name* Comp Days
Units* Days
Exempt From Dock* True - DO NOT DOCK

Edit a Leave Type

Finance > HR > Leave > Leave Type

Click  next to the contract type that will be corrected.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

Leave Types Add Leave Type

Page Size: 10 | Filter: Active Records

System ID	Code	Name	Leave Units	Exempt From Dock	Actions
16		BEREAVEMENT		True	
24	Comp	Comp Days	Days	True	
17		FMLA	Hours	False	
18		JURY DUTY	Hours	True	
20		LEAVE WITHOUT PAY	Hours	False	
21		MILITARY LEAVE	Hours	False	
2		PTO	Hours	False	
11		SCHOOL RELATED	Hours	True	

Records: 8 | Page 1 of 1

Click on  **Edit Identifier**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

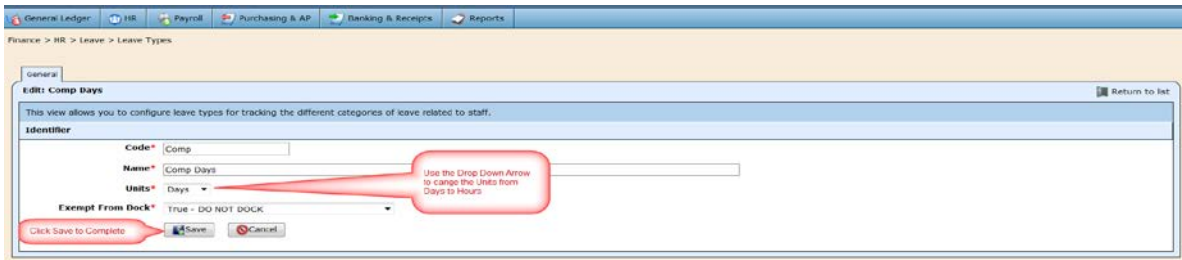
This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier Edit Identifier

Code* Comp
Name* Comp Days
Units* Days
Exempt From Dock* False - Dock in accordance with employee policy

Correct the appropriate fields, such as Hours or Days.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier

Code* Comp

Name* Comp Days

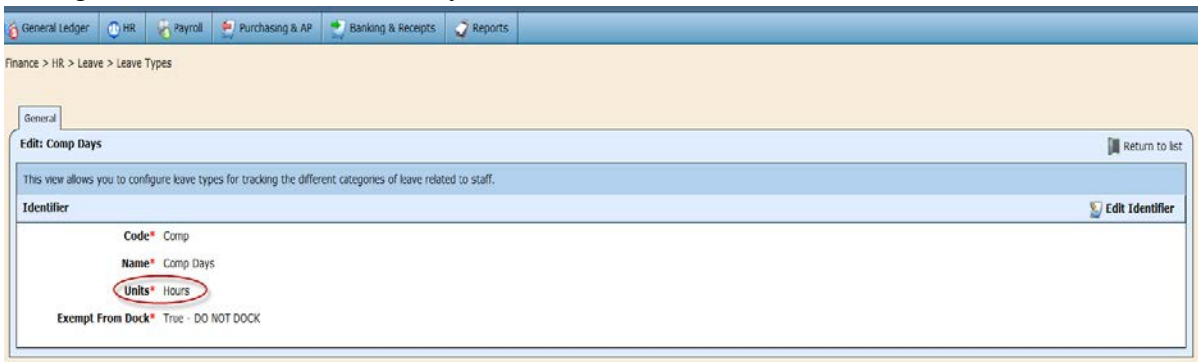
Units* Days

Exempt From Dock* True - DO NOT DOCK

Click Save to Complete Save Cancel

Use the Drop Down Arrow to change the Units from Days to Hours

The changes will show on the summary screen below.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

General

Edit: Comp Days Return to list

This view allows you to configure leave types for tracking the different categories of leave related to staff.

Identifier Edit Identifier

Code* Comp


Name* Comp Days

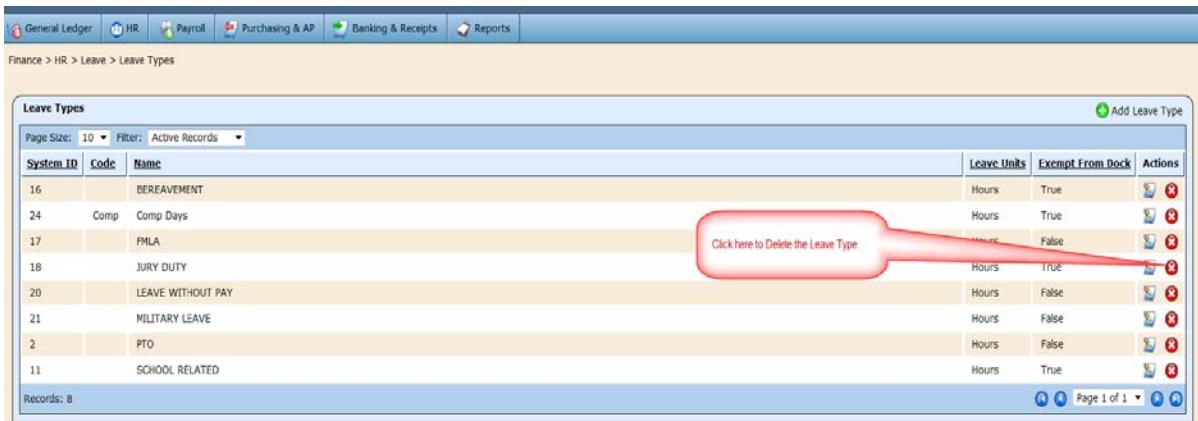
Units* Hours

Exempt From Dock* True - DO NOT DOCK

Delete a Leave Type

Finance > HR > Leave > Leave Types

Click  next to the leave type that will be deleted.



















General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Types

Leave Types Add Leave Type

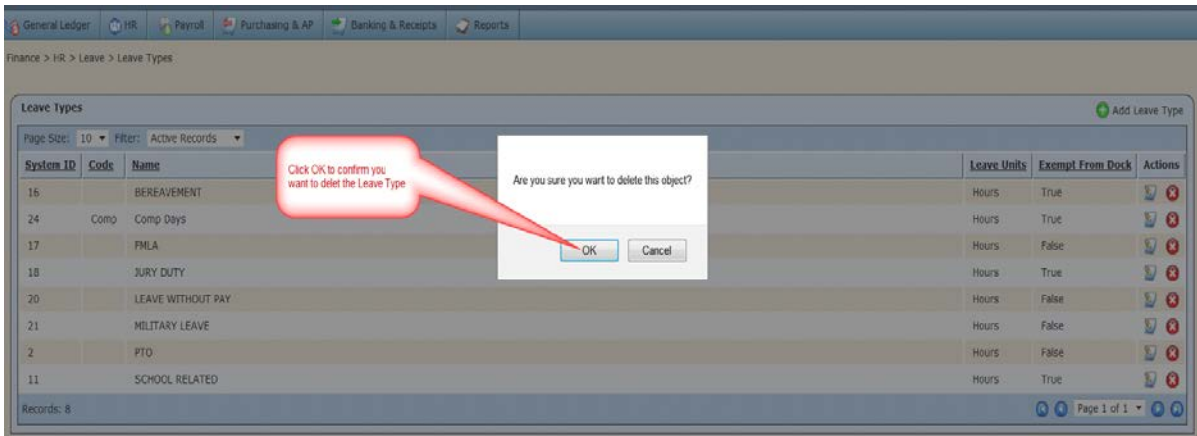
Page Size: 10 Filter: Active Records

System ID	Code	Name	Leave Units	Exempt From Dock	Actions
16		BEREAVEMENT	Hours	True	 
24	Comp	Comp Days	Hours	True	 
17		PMLA	Hours	False	 
18		JURY DUTY	Hours	True	 
20		LEAVE WITHOUT PAY	Hours	False	 
21		MILITARY LEAVE	Hours	False	 
2		PTO	Hours	False	 
11		SCHOOL RELATED	Hours	True	 

Records: 8 Page 1 of 1

Click here to Delete the Leave Type

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



Restore a Leave Type

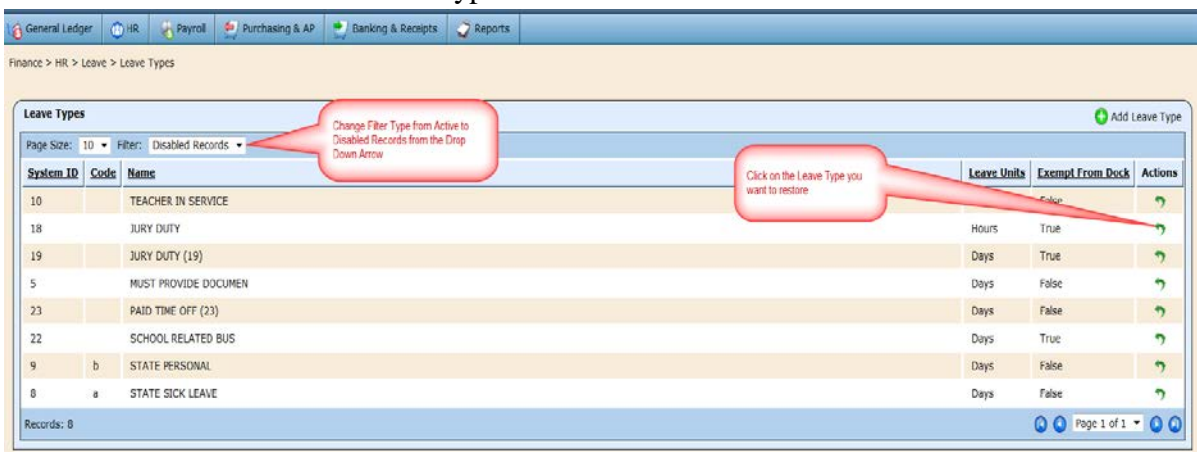
If a leave type has been deleted, but has *never been used during a payroll process* it will be permanently deleted.

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

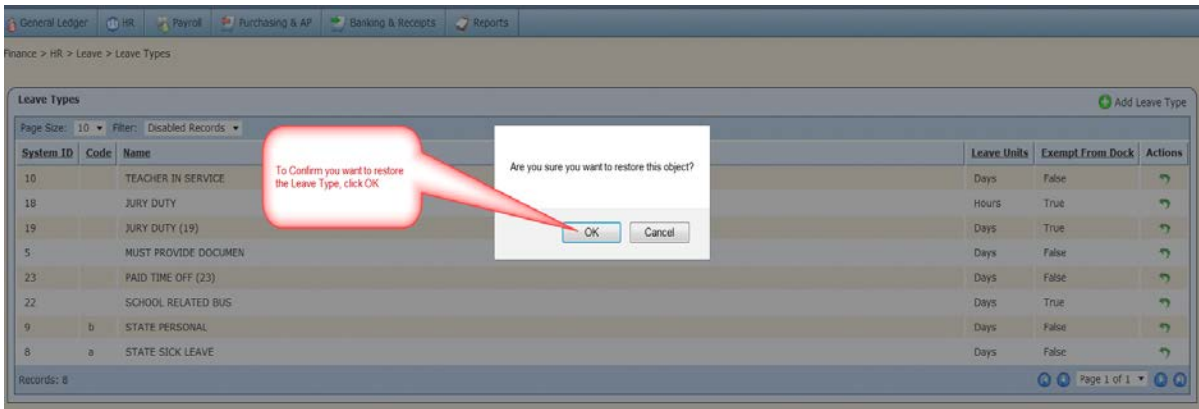
Finance > HR > Leave > Leave Types

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

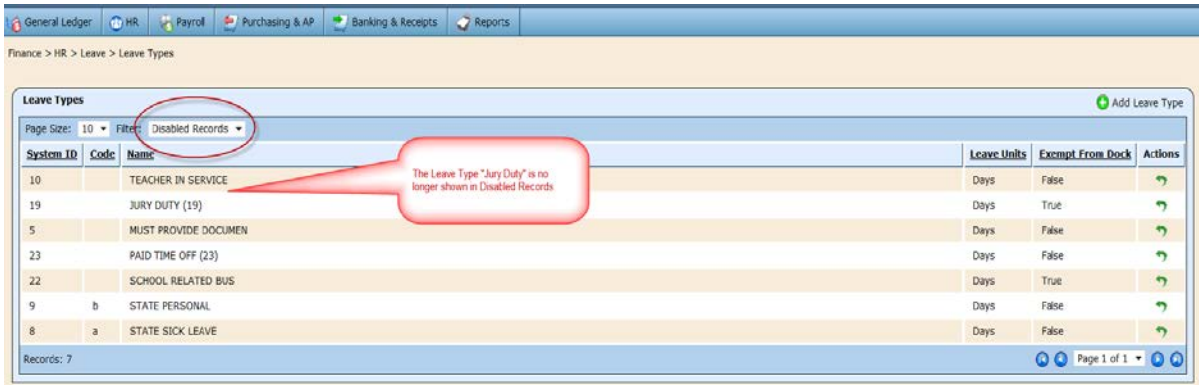
Click on  to restore to the leave types



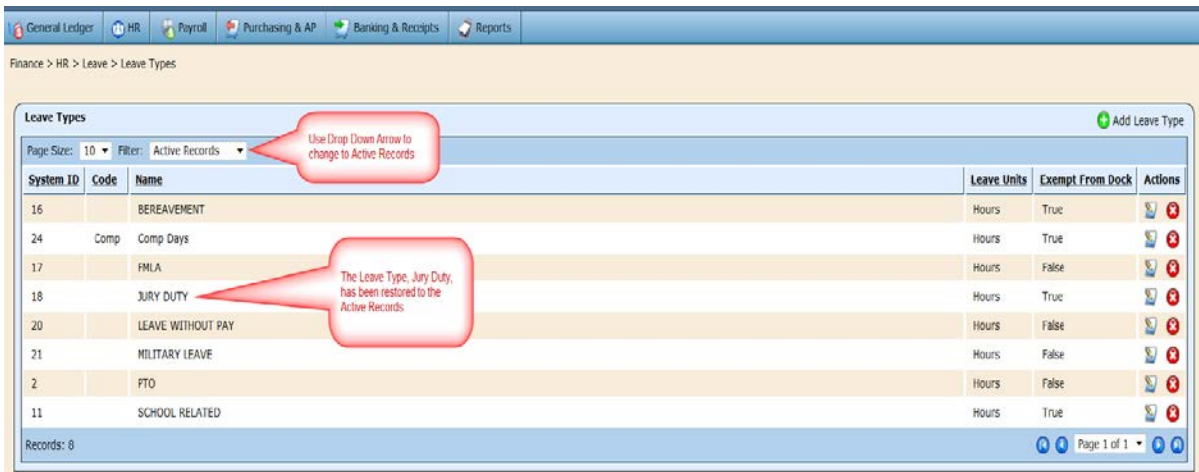
Click **OK** to continue to restore the leave type.



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 Policies 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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Staff Manager

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

Tucker, Sheila

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

Leave for: 2015-2016 School Year

Initialize Leave Balance

Category/Type	Carried Forward	Earned		Used	Dock			Available	Actions
		Adjusted	Accrued		Grace	Reduced	Full		
JURY DUTY	5.00	8.00	0.00	0.00	0.00	0.00	0.00	13.00	
SCHOOL RELATED	8.00	5.00	0.00	0.00	0.00	0.00	0.00	13.00	

Adding a Leave Policy

Finance > HR > Leave > Leave Policies

Click  **Add Leave Policy**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies

Page Size: 10 | Filter: Active Records

System ID	Name	Actions
2	182 & 187 Day Leave	
3	All Year Employees	
1	Not Eligible for Leave	

Records: 3

Page 1 of 1

Name – Enter the name of the leave policy.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

New Leave Policy

Leave policies allow you to define the manner in which leave is accrued and docked.

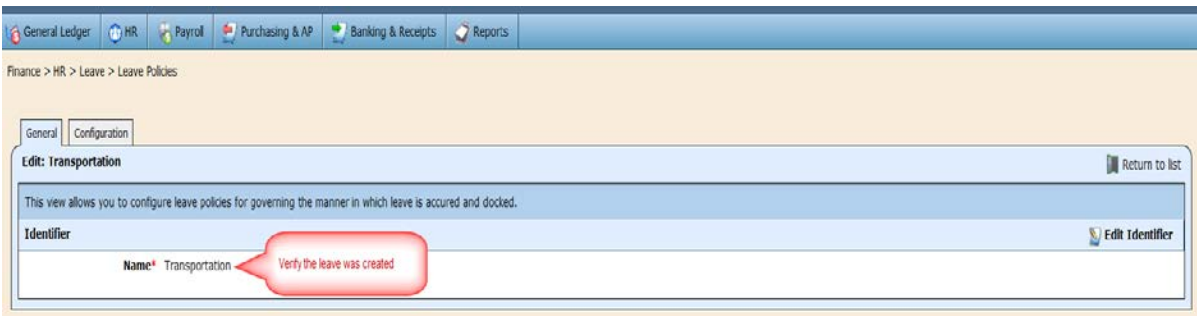
Identifier

Name* Transportation

Click Create to Complete

Create Cancel

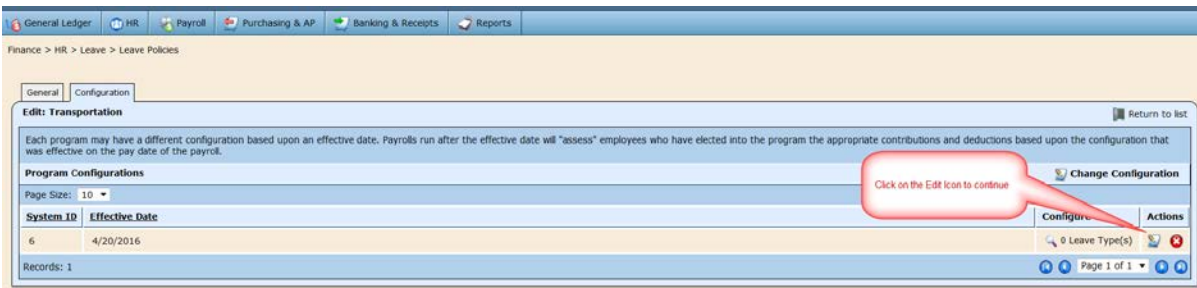
Click  **Create**



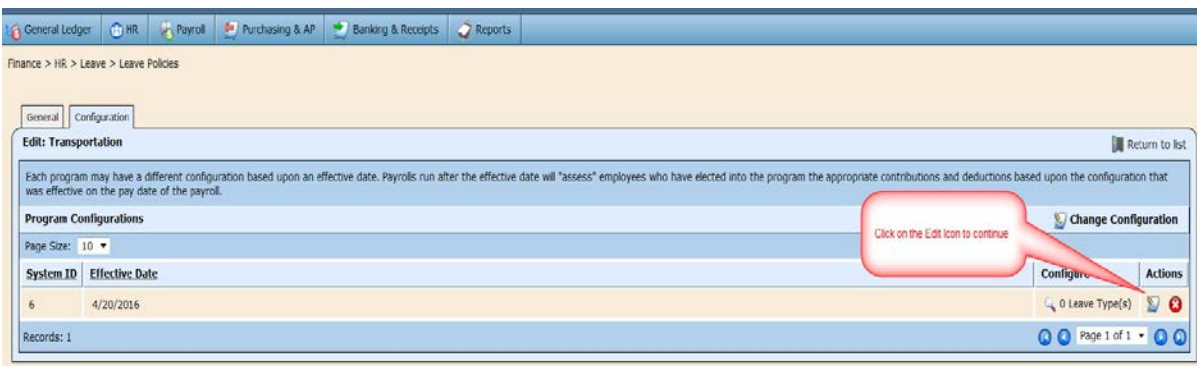
Click the **Configuration** tab.



This will take you to the Configuration Summary Screen.

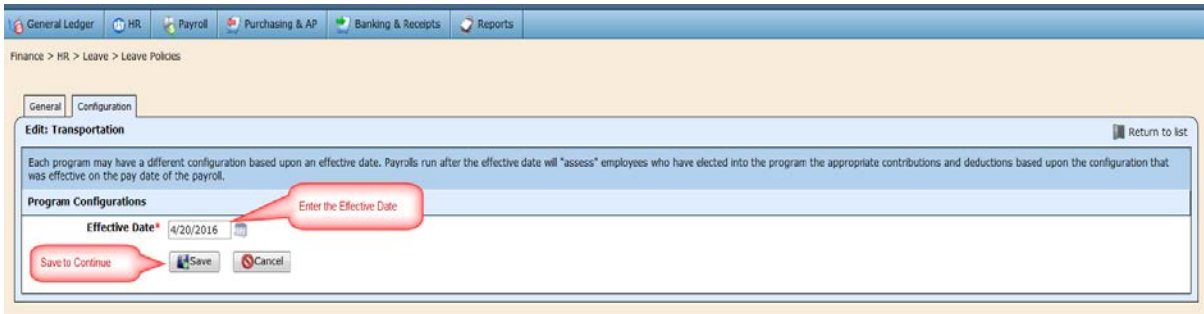


Click on  **Edit Identifier**



Enter the effective date of the leave policy.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

General | Configuration

Edit: Transportation Return to list

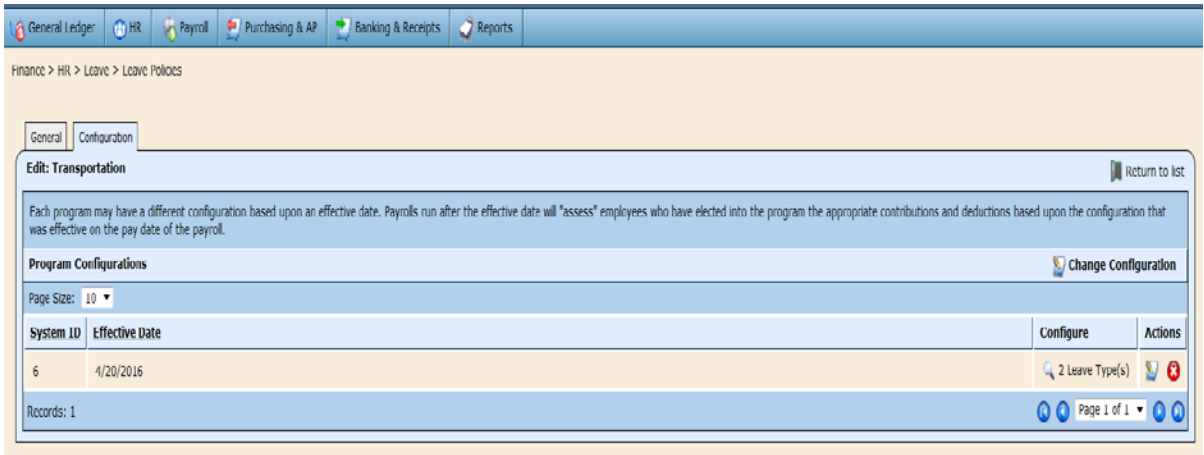
Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.

Program Configurations Change Configuration

Effective Date* 4/20/2016 Enter the Effective Date

Save to Continue Save Cancel

You will return to the Configuration Summary Screen.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies




General | Configuration

Edit: Transportation Return to list

Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.

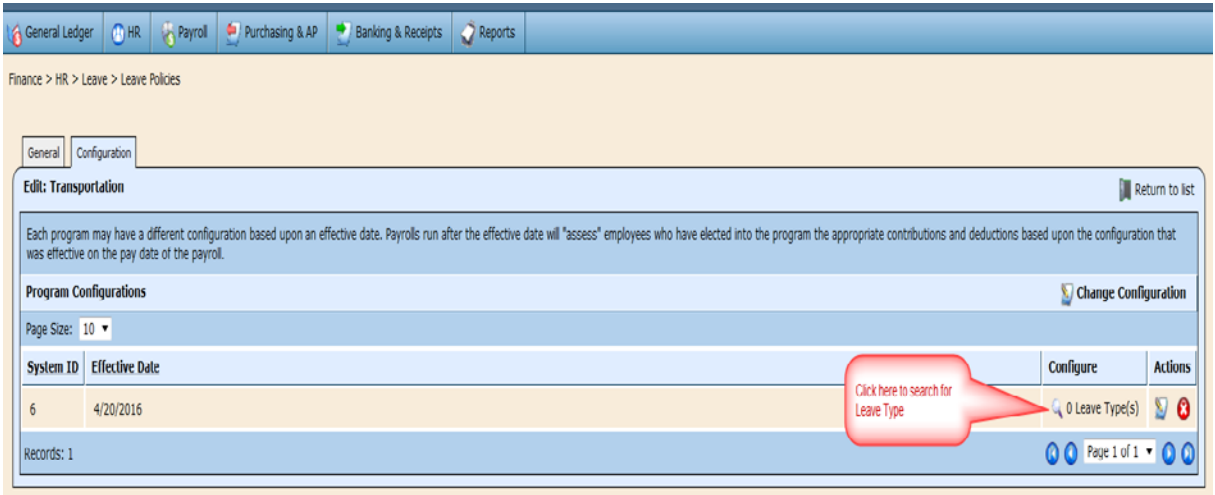
Program Configurations Change Configuration

Page Size: 10

System ID	Effective Date	Configure	Actions
6	4/20/2016	2 Leave Type(s)	  

Records: 1 Page 1 of 1

Click  **0 Leave Type(s)**



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies




General | Configuration

Edit: Transportation Return to list

Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.

Program Configurations Change Configuration

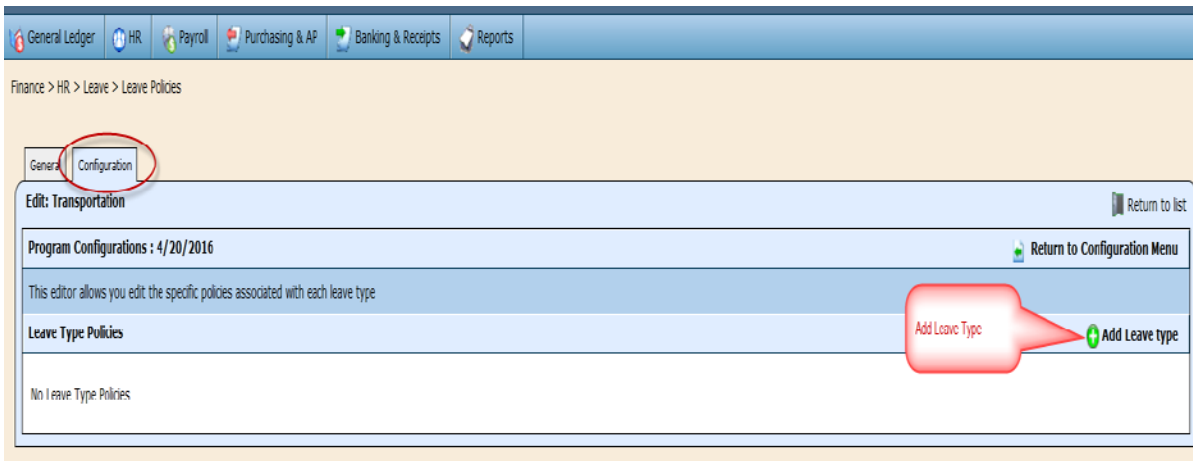
Page Size: 10

System ID	Effective Date	Configure	Actions
6	4/20/2016	0 Leave Type(s)	  

Records: 1 Page 1 of 1

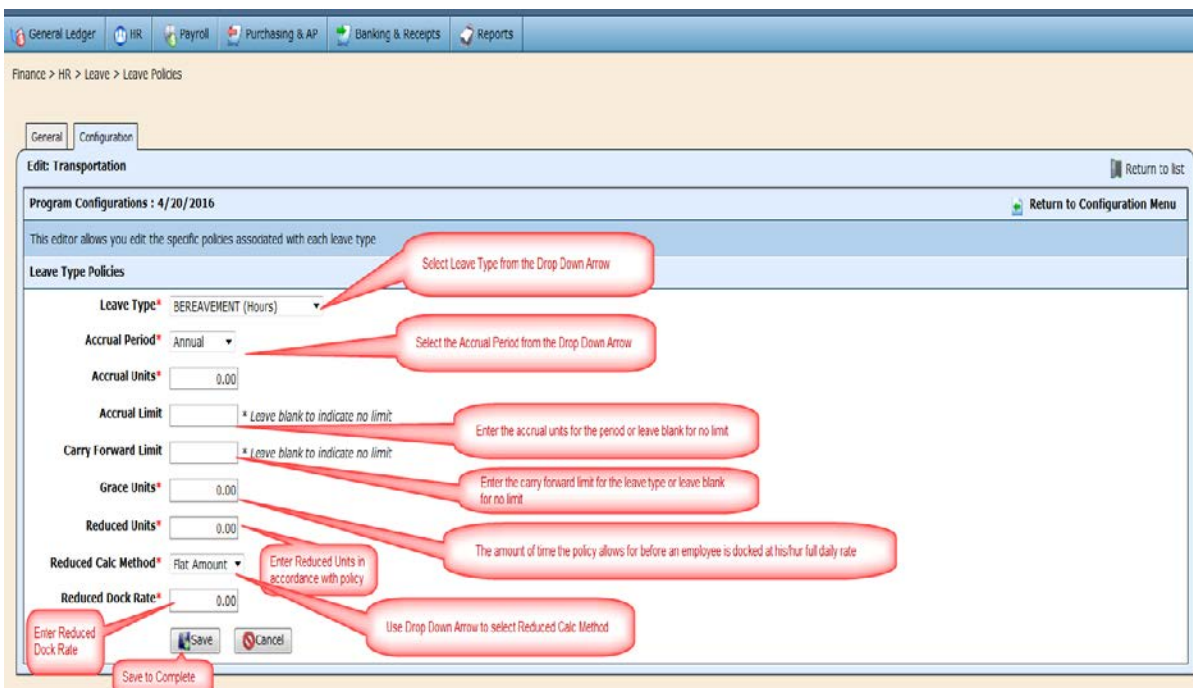
Click here to search for Leave Type

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.

When all Leave Policies have been added, Return to Configuration to review policies


Continue to Add Leave Policies until are are complete

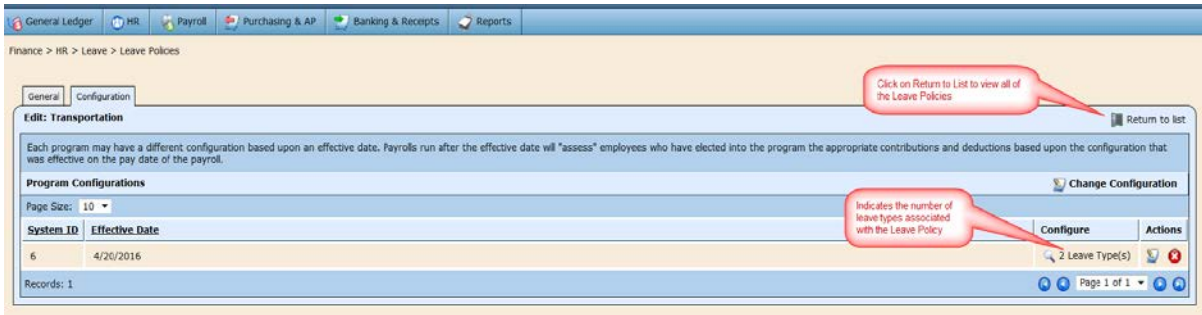
Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
BEREAVEMENT	2.00 Hours each year up to 2.00 total	No Limit	0.00 Hours	0.00 Hours	[Icons]
JURY DUTY	8.00 Hours each year up to 8.00 total	No Limit	0.00 Hours	0.00 Hours	[Icons]

Click **Return to Configuration Menu**

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.



Finance > HR > Leave > Leave Policies

General Configuration

Edit: Transportation

Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.

Program Configurations


Page Size: 10

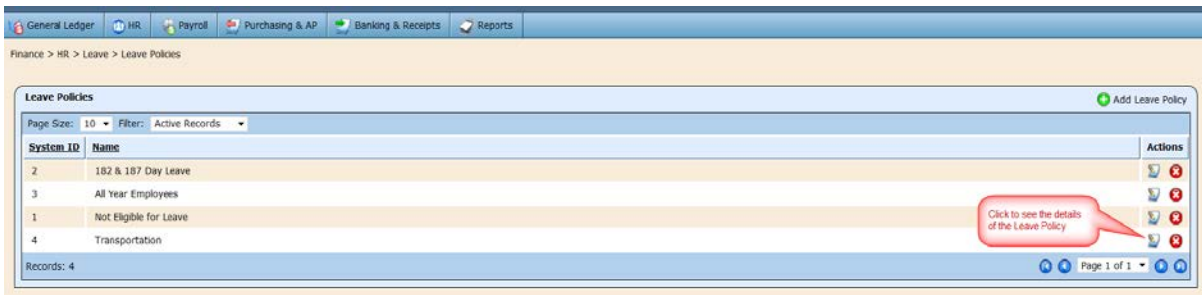
System ID	Effective Date
6	4/26/2016

Records: 1

Click on Return to List to view all of the Leave Policies

Indicates the number of leave types associated with the Leave Policy

Click on  to see the details of that leave policy.



Finance > HR > Leave > Leave Policies

Leave Policies

Page Size: 10 Filter: Active Records


System ID	Name	Actions
2	182 & 187 Day Leave	
3	All Year Employees	
1	Not Eligible for Leave	
4	Transportation	

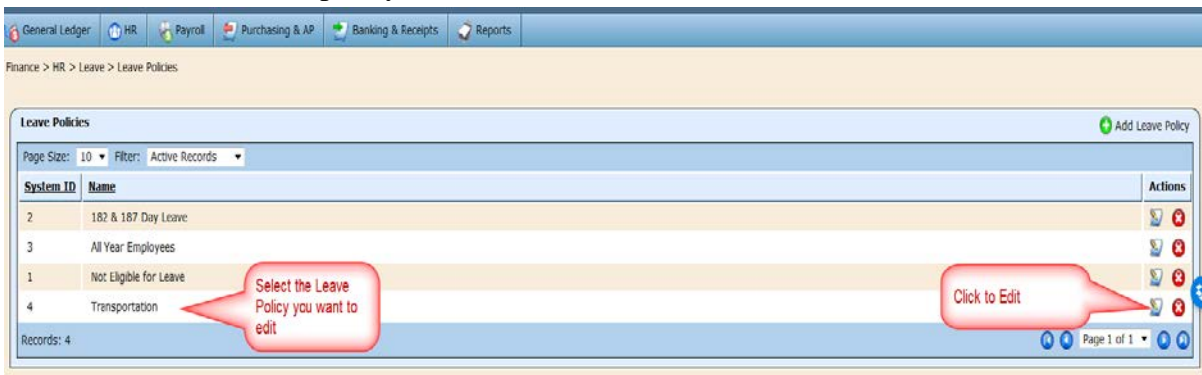
Records: 4

Click to see the details of the Leave Policy

Edit a Leave Policy

Finance > HR > Leave > Leave Policies

Click  next to the leave policy that will be corrected.



Finance > HR > Leave > Leave Policies

Leave Policies

Page Size: 10 Filter: Active Records

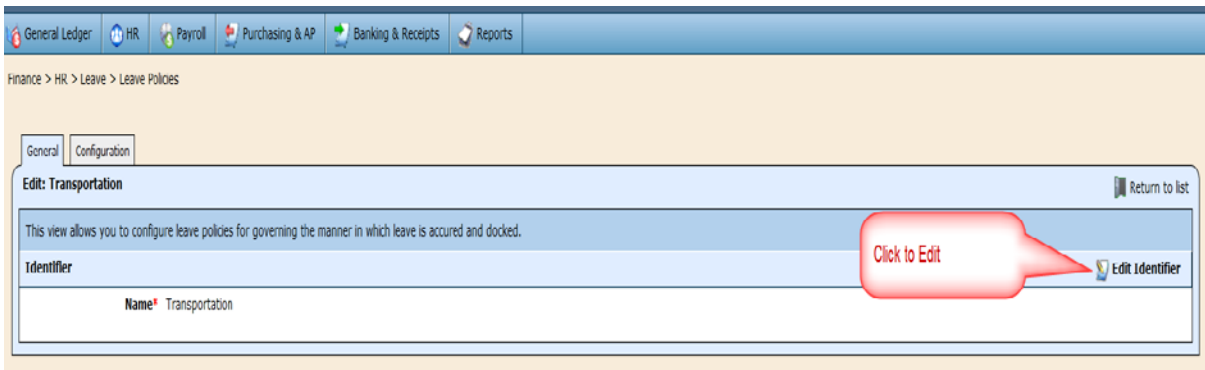
System ID	Name	Actions
2	182 & 187 Day Leave	
3	All Year Employees	
1	Not Eligible for Leave	
4	Transportation	

Records: 4

Select the Leave Policy you want to edit

Click to Edit

Click  **Edit Identifier**




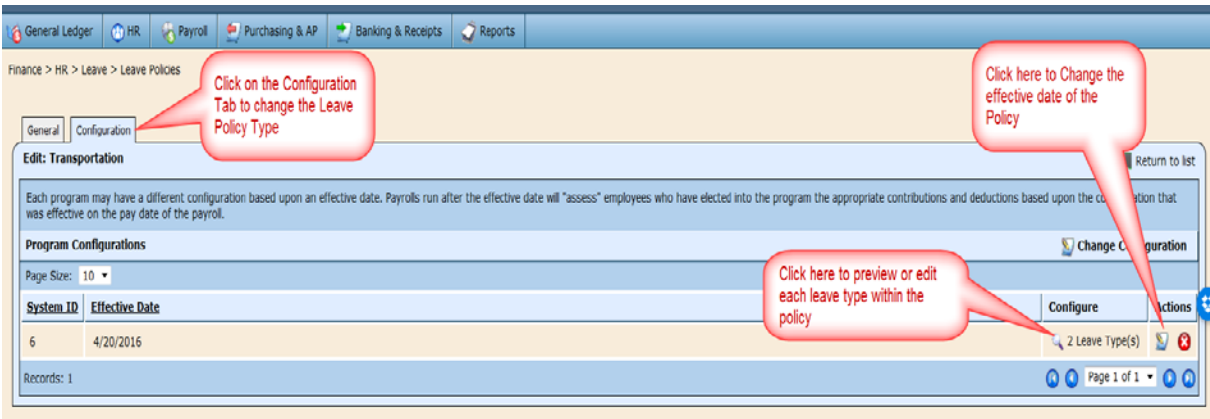
Correct the name if applicable.

Click  **Save**



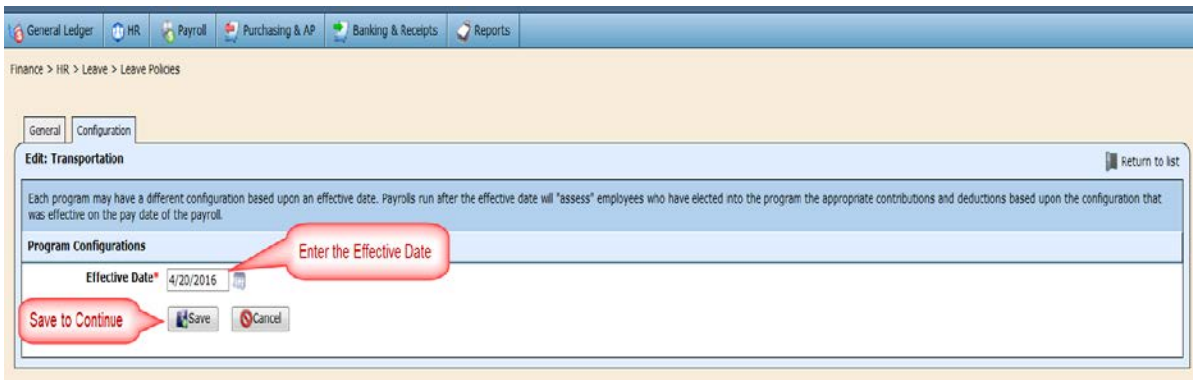
Click on the **Configuration** Tab.

Click  to change the effective date of the leave policy.



Change the effective date of the policy if applicable.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

General | Configuration

Edit: Transportation Return to list


Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.

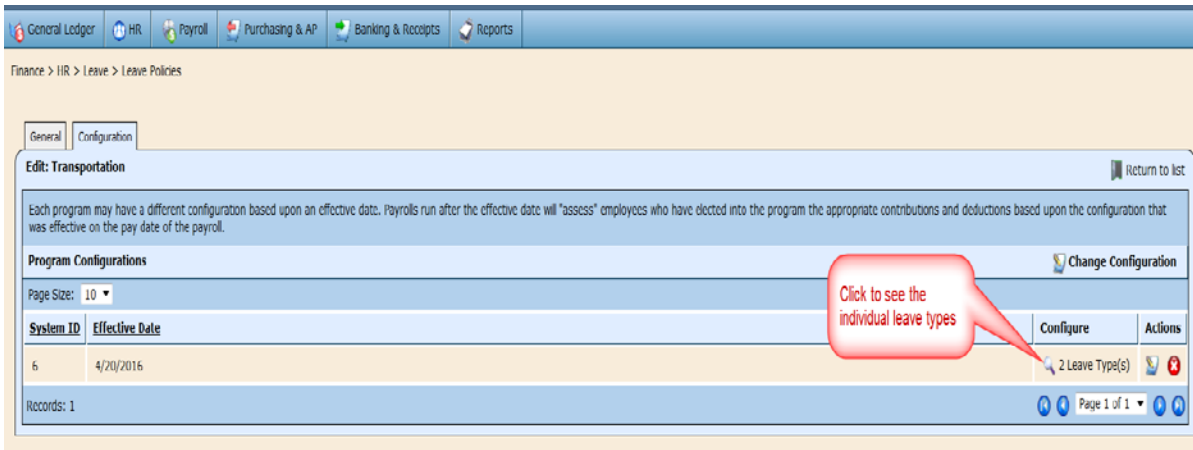
Program Configurations

Effective Date* 4/20/2016 Enter the Effective Date

Save to Continue Save Cancel

You will return to the Configuration summary screen.

Click  to view the leave types within the leave policy.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

General | Configuration

Edit: Transportation Return to list

Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.


Program Configurations Change Configuration

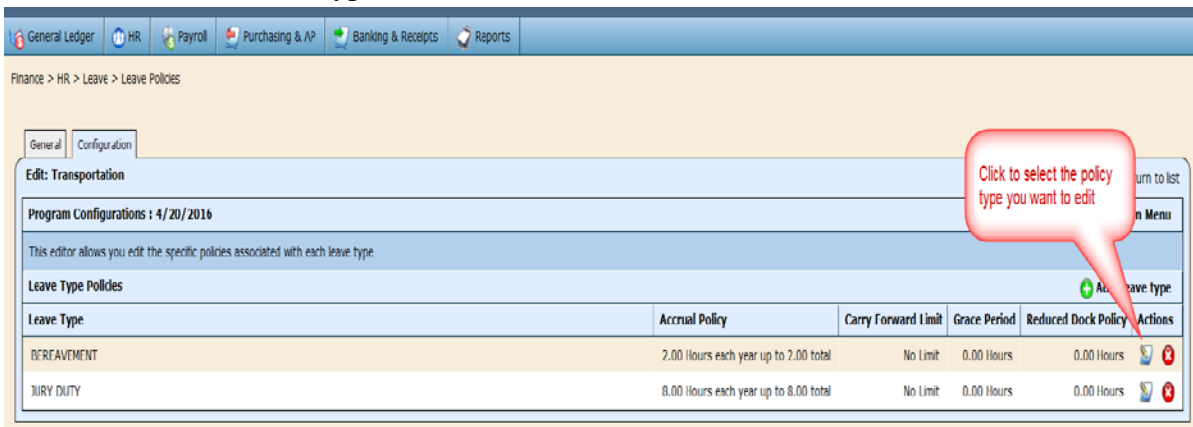
Page Size: 10

System ID	Effective Date	Configure	Actions
6	4/20/2016		2 Leave Type(s)

Records: 1 Page 1 of 1

Click to see the individual leave types

Click  next to the leave type to be corrected.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

General | Configuration

Edit: Transportation Return to list


Program Configurations : 4/20/2016

This editor allows you to 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
BEREAVEMENT	2.00 Hours each year up to 2.00 total	No Limit	0.00 Hours	0.00 Hours	
JURY DUTY	8.00 Hours each year up to 8.00 total	No Limit	0.00 Hours	0.00 Hours	

Click to select the policy type you want to edit

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

General | Configuration

Edit: Transportation Return to list

Program Configurations : 4/20/2016 Return to Configuration Menu

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

Leave Type Policies

Leave Type* JURY DUTY (Hours) ▾

Accrual Period* Annual ▾

Accrual Units*

Accrual Limit * Leave blank to indicate no limit

Carry Forward Limit * Leave blank to indicate no limit

Grace Units*

Reduced units*


Reduced Calc Method* Flat Amount ▾

Reduced Dock Rate*

Save to Complete

Delete a Leave Policy Type

Finance > HR > Leave > Leave Policies >


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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies + Add Policy

Page Size: 10 | Filter: Active Records ▾


System ID	Name	Actions
2	182 & 187 Day Leave	 
3	All Year Employees	 
1	Not Eligible for Leave	 
4	Transportation	 

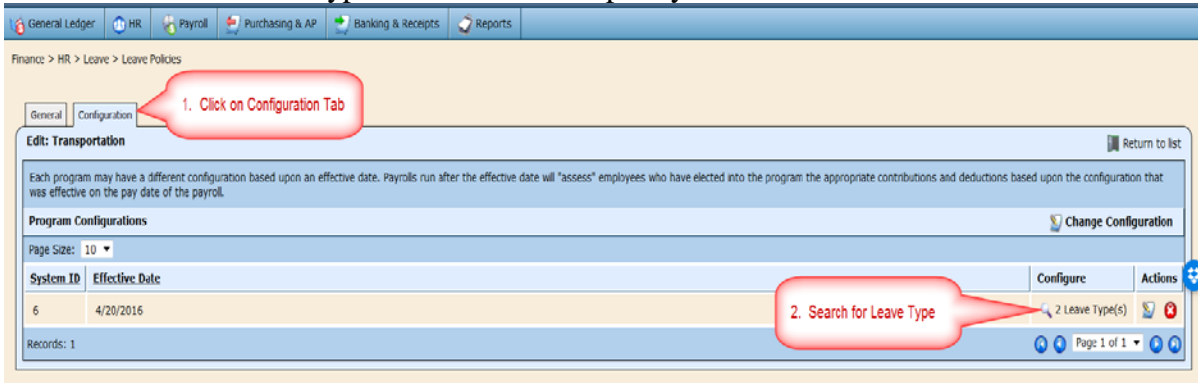
Records: 4 Page 1 of 1

Note: Selecting this option will delete the entire Leave Policy

Select the Policy you want to delete Leave Type from

Select Configuration Tab

Click  to view the leave types within the leave policy.



Finance > HR > Leave > Leave Policies

General Configuration


1. Click on Configuration Tab

Edit: Transportation

Each program may have a different configuration based upon an effective date. Payrolls run after the effective date will "assess" employees who have elected into the program the appropriate contributions and deductions based upon the configuration that was effective on the pay date of the payroll.


Program Configurations

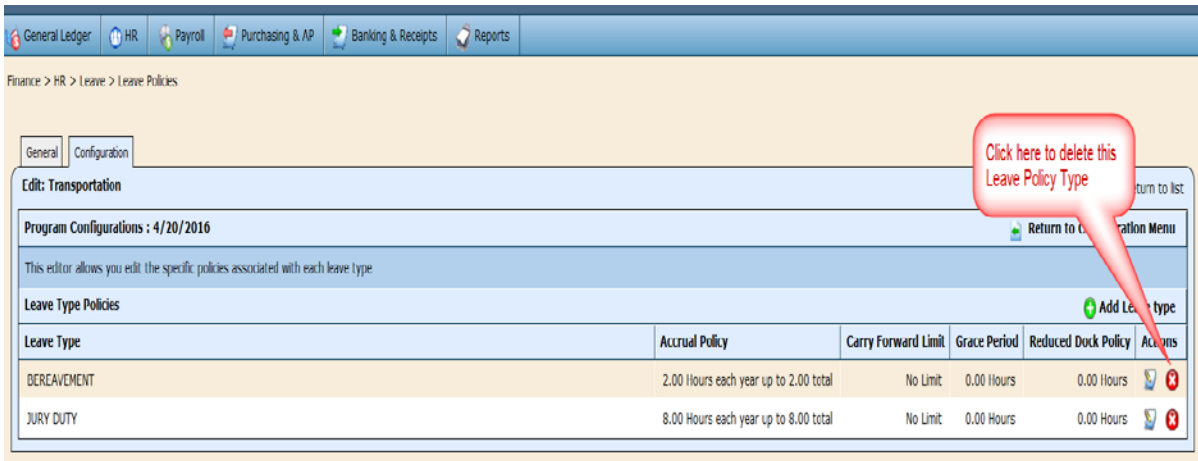
Page Size: 10

System ID	Effective Date	Configure	Actions
6	4/20/2016	2 Leave Type(s)	

Records: 1

2. Search for Leave Type

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



Finance > HR > Leave > Leave Policies



General Configuration

Edit: Transportation

Program Configurations : 4/20/2016

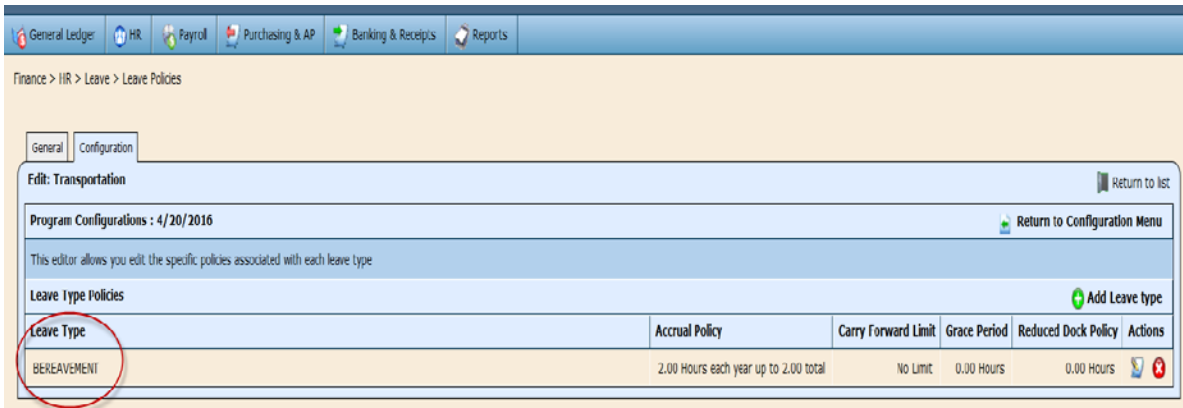
This editor allows you edit the specific policies associated with each leave type

Leave Type Policies

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
BEREAVEMENT	2.00 Hours each year up to 2.00 total	No Limit	0.00 Hours	0.00 Hours	
JURY DUTY	8.00 Hours each year up to 8.00 total	No Limit	0.00 Hours	0.00 Hours	

Click here to delete this Leave Policy Type

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



Finance > HR > Leave > Leave Policies


General Configuration

Edit: Transportation

Program Configurations : 4/20/2016


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

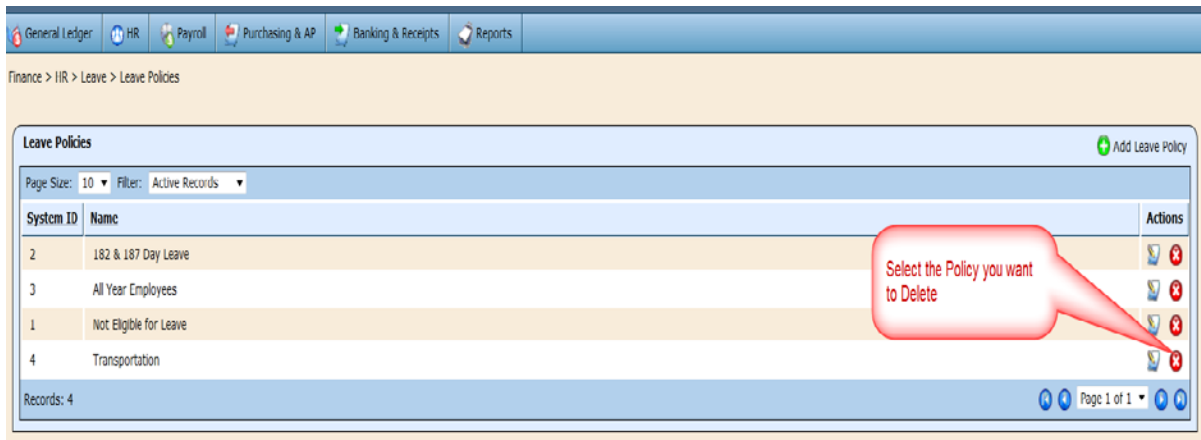
Leave Type Policies

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
BEREAVEMENT	2.00 Hours each year up to 2.00 total	No Limit	0.00 Hours	0.00 Hours	

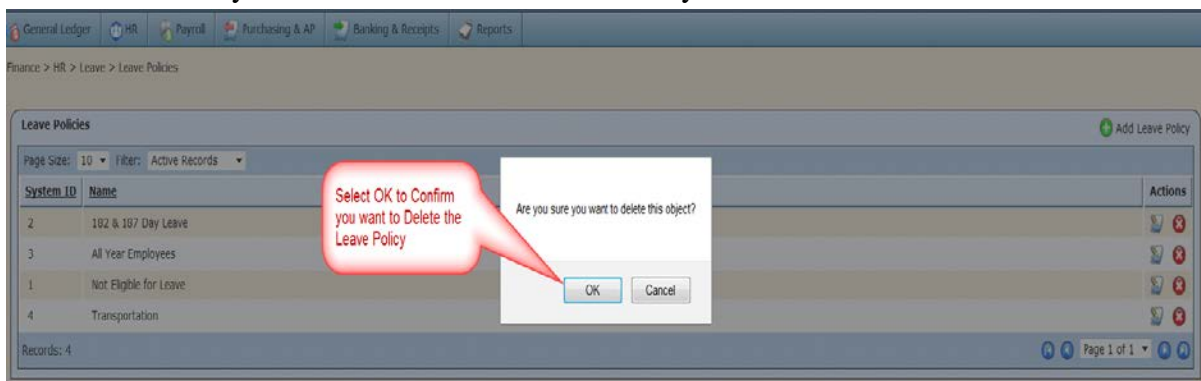
Delete a Leave Policy

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 active records to disabled 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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies + Add Leave Policy

Page Size: 10 | Filter: Active Records

System ID	Name	Actions
2	182 & 187 Day Leave	
5	Bus Transportation	
1	Not Eligible for Leave	
6	Transportation	

Records: 4 Page 1 of 1

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

Disabled Records

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies + Add Leave Policy

Page Size: 10 | Filter: Disabled Records

System ID	Name	Actions
3	All Year Employees	

Records: 1 Page 1 of 1

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies + Add Leave Policy

Page Size: 10 | Filter: Disabled Records

System ID	Name	Actions
3	All Year Employees	

Records: 1

Are you sure you want to restore this object?

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies + Add Leave Policy

Page Size: 10 | Filter: Disabled Records

System ID	Name	Actions
No Leave Policies Found		

Records: 0 Page 1 of 1

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Leave > Leave Policies

Leave Policies Add Leave Policy

Page Size: 10 | Filter: Active Records

System ID	Name	Actions
2	182 & 187 Day Leave	
3	All Year Employees	
5	Bus Transportation	
1	Not Eligible for Leave	
6	Transportation	

Records: 5 Page 1 of 1

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.

The screenshot shows the 'HR Info' page for 'Tucker, Sheila'. The breadcrumb trail is 'Finance > HR > Staff Manager'. The 'HR Information' section includes the following fields:

- Primary Facility***: 750-Central Office (Callout: "This designates the primary location where the employee works")
- Employment Status***: 1379 - Full-Time (Callout: "This is an Employment Status")
- Degree Type***: None (Callout: "This is a Degree Type")
- Timeclock ID***: 001726
- Drivers License**: None
- Eligible For Rehire***: Eligible for re-hire
- Original Hire Date***: 9/1/2015
- Retirement Date**: None

Finance > HR > Support Codes > Employment Status

The screenshot shows the 'Employment Statuses' list. The breadcrumb trail is 'Finance > HR > Support Codes > Employment Status'. The table below lists the available employment status codes:

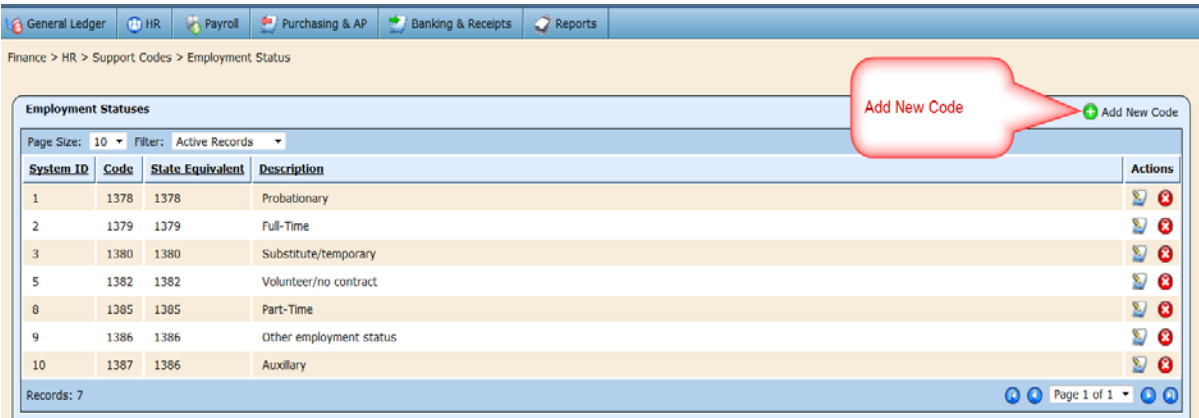
System ID	Code	State Equivalent	Description	Actions
1	1378	1378	Probationary	[Edit] [Delete]
2	1379	1379	Full-Time	[Edit] [Delete]
3	1380	1380	Substitute/temporary	[Edit] [Delete]
5	1382	1382	Volunteer/no contract	[Edit] [Delete]
8	1385	1385	Part-time	[Edit] [Delete]
9	1386	1386	Other employment status	[Edit] [Delete]
10	1387	1386	Auxiliary	[Edit] [Delete]

Records: 7 | Page 1 of 1

Adding a New Employment Status Code

Finance > HR > Support Codes > Employment Status















Click on  **Add New Code**



Finance > HR > Support Codes > Employment Status

Employment Statuses

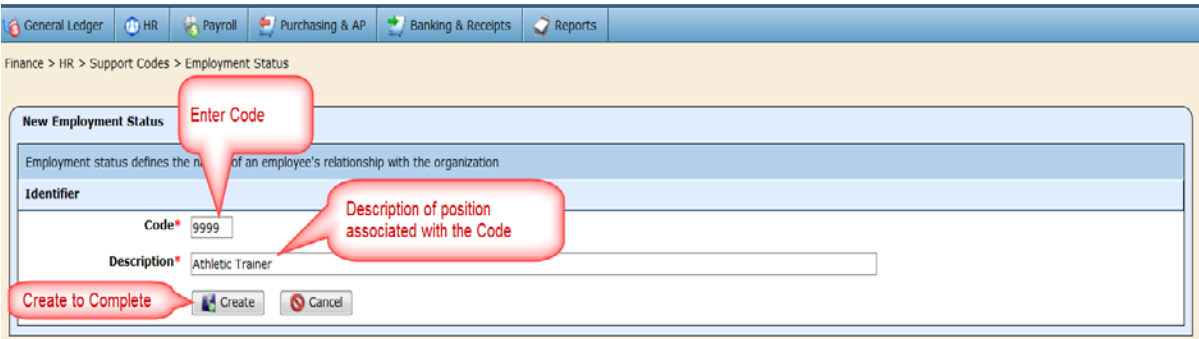
Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	1378	1378	Probationary	 
2	1379	1379	Full-Time	 
3	1380	1380	Substitute/temporary	 
5	1382	1382	Volunteer/no contract	 
8	1385	1385	Part-Time	 
9	1386	1386	Other employment status	 
10	1387	1386	Auxiliary	 

Records: 7 Page 1 of 1

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

Click  **Create**



Finance > HR > Support Codes > Employment Status



New Employment Status

Employment status defines the nature of an employee's relationship with the organization

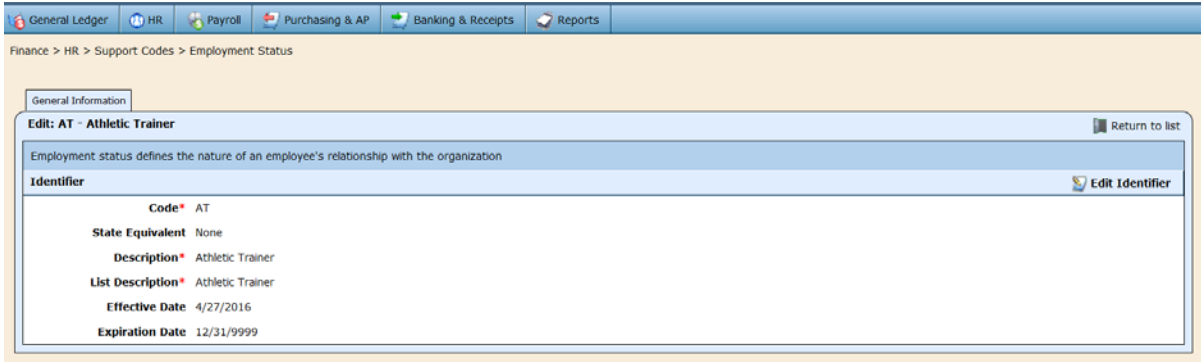
Identifier

Code* 9999

Description* Athletic Trainer

Create to Complete  

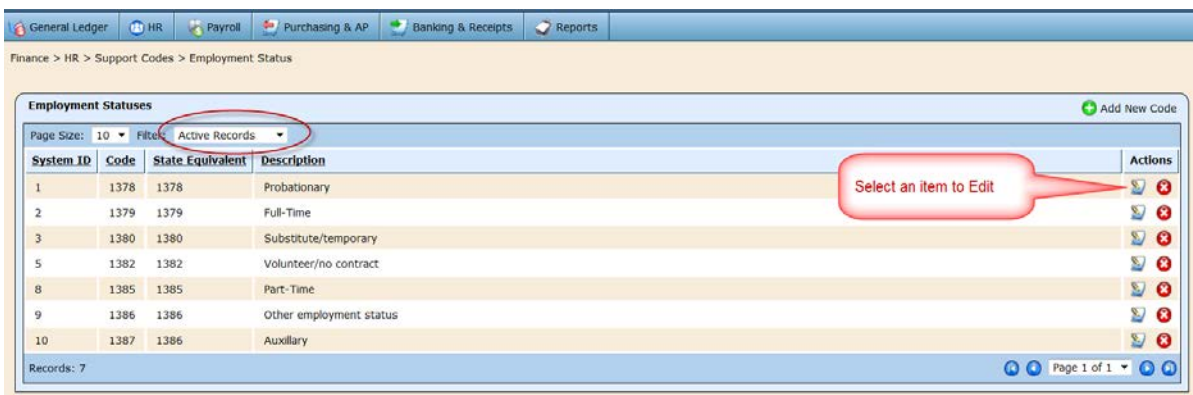
A summary screen will appear. Verify the information you have entered is correct. If it is not, refer to the Edit an Existing Employment Status Code.



Edit an Existing Employment Status Code

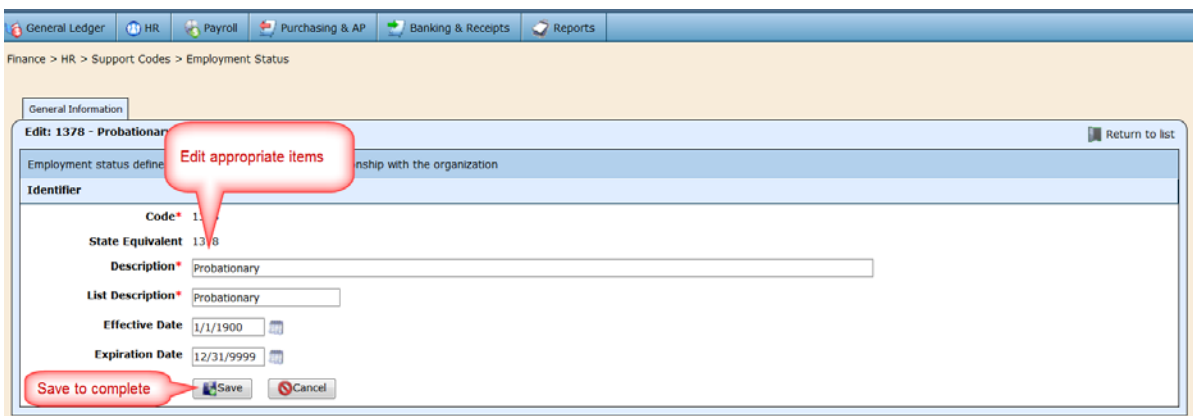
Finance > HR > Support Codes > Employment Status

Click  **Edit**

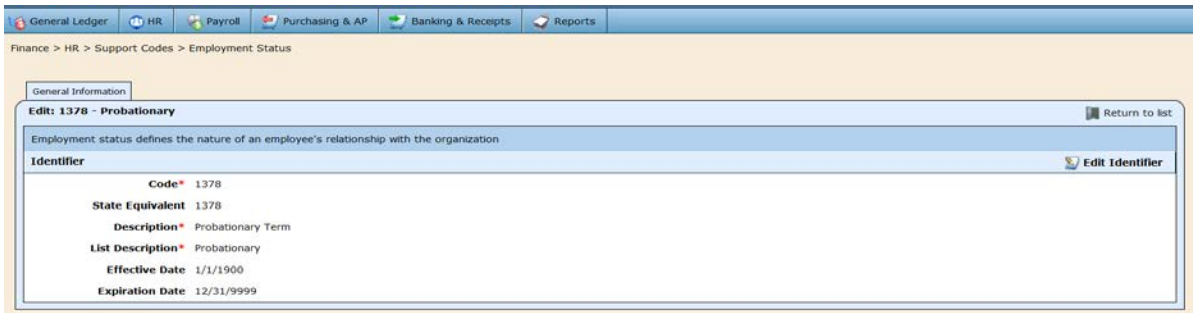


Edit the appropriate items.

Click  **Create**



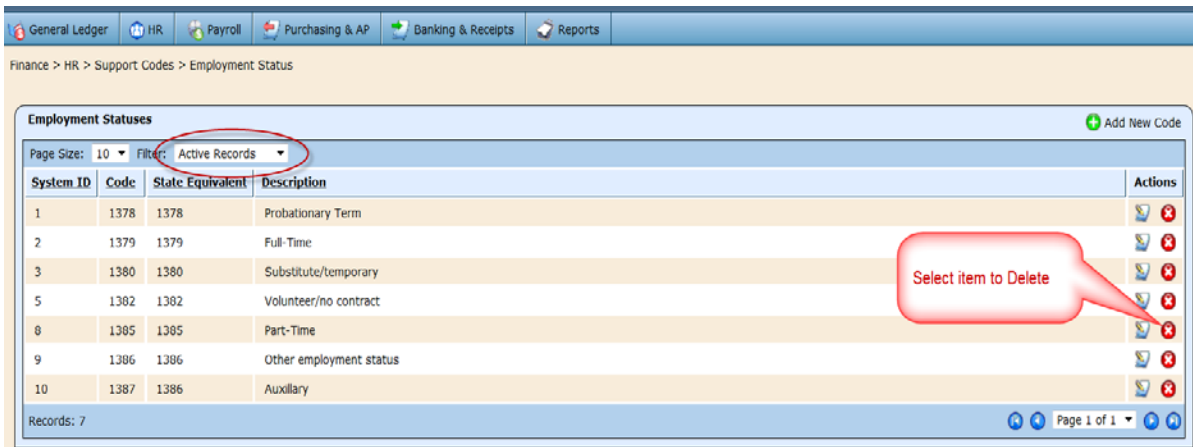
The summary screen will show changes. Verify the changes are correct. If not, return to Edit Identifier.



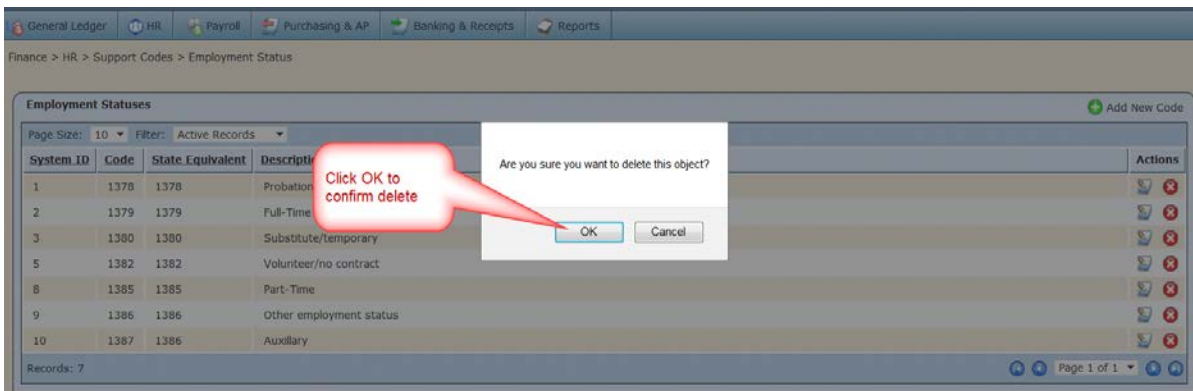
Deleting an Employment Status Code

Finance > HR > Support Codes > Employment Status

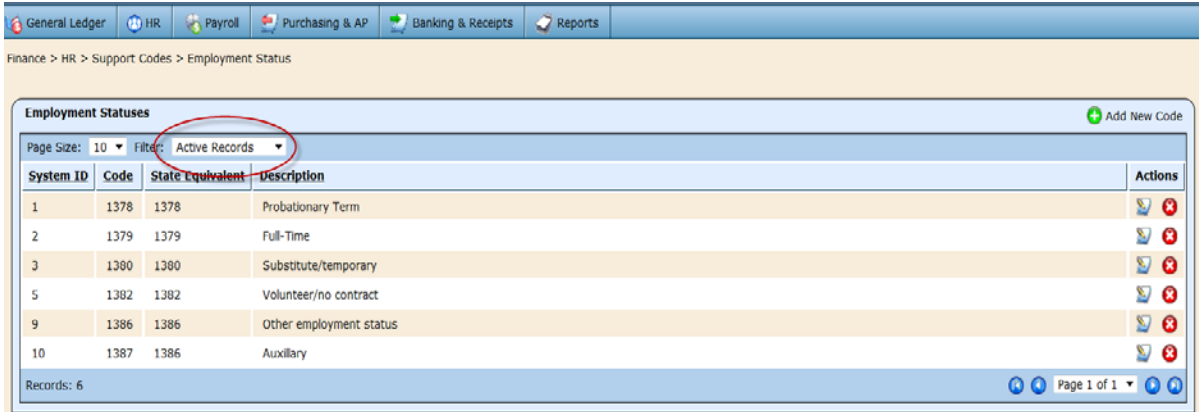
Click  next to the Employment Status to be deleted.



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




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

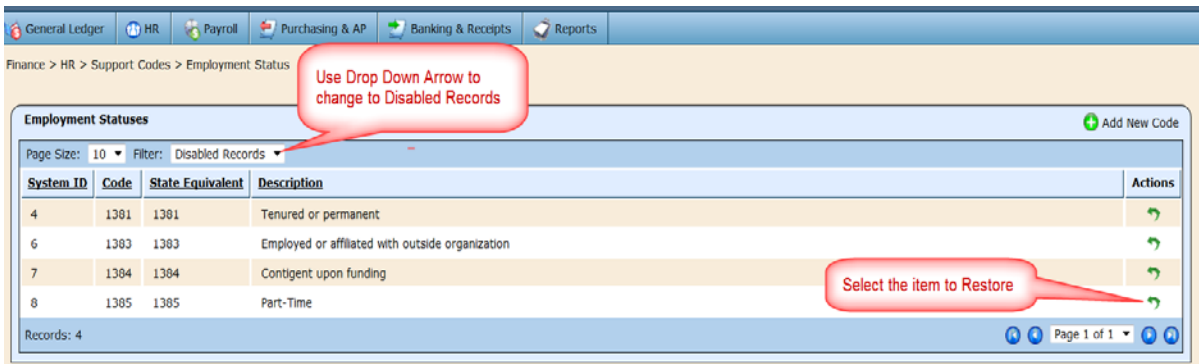


Restore an Employment Status Code

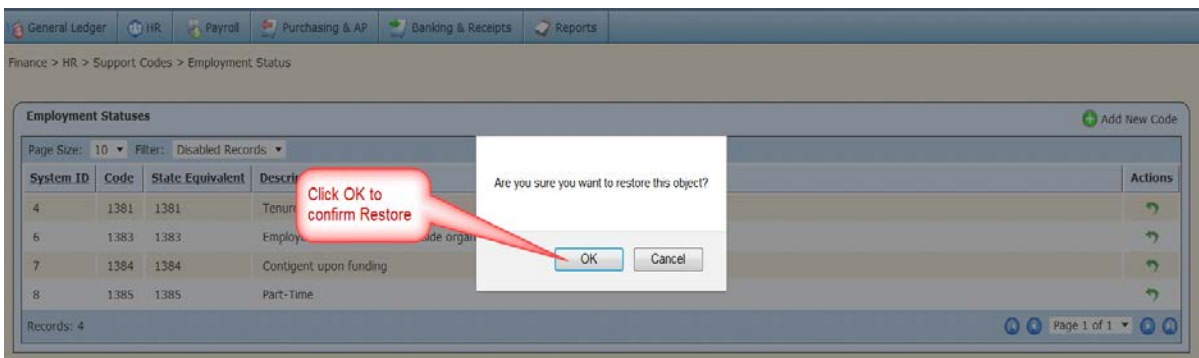
Finance > HR > Support Codes > Employment Status

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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Employment Status

Employment Statuses + Add New Code

Page Size: 10 Filter: Disabled Records

System ID	Code	State Equivalent	Description	Actions
4	1381	1381	Tenured or permanent	
6	1383	1383	Employed or affiliated with outside organization	
7	1384	1384	Contigent upon funding	

Records: 3 Page 1 of 1

Change to Active Records to verify the item has been Restored

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Employment Status

Use Drop Down Arrow to change to Active Records

Employment Statuses + Add New Code

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	1378	1378	Probationary Term	
2	1379	1379	Full-Time	
3	1380	1380	Substitute/temporary	
5	1382	1382	Volunteer/no contract	
8	1385	1385	Part-Time	
9	1386	1386	Other employment status	
10	1387	1386	Auxiliary	

Item has been Restored to Active Records

Records: 7 Page 1 of 1

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.

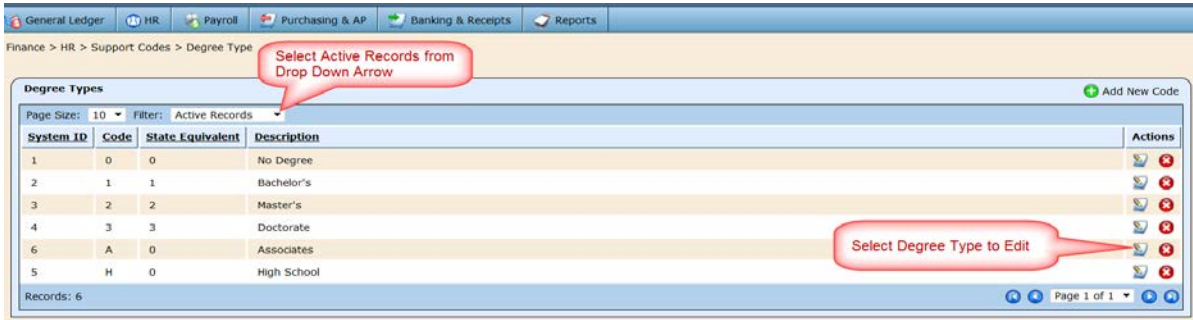
State Equivalent – This field defaults to “None” when the Degree Type is created. To change for PEIMS reporting, Edit Identifier and use the drop down arrow to select the appropriate option.

Click  **Save**

Edit Degree Types

Finance > HR > Support Codes > Degree Type

Click  Edit Degree Type



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Degree Type

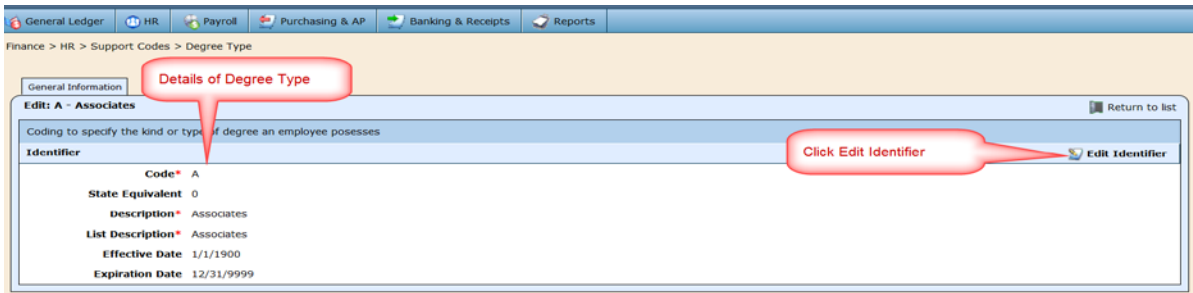
Select Active Records from Drop Down Arrow

System ID	Code	State Equivalent	Description	Actions
1	0	0	No Degree	
2	1	1	Bachelor's	
3	2	2	Master's	
4	3	3	Doctorate	
6	A	0	Associates	
5	H	0	High School	

Records: 6 | Page 1 of 1

Select Degree Type to Edit

Click  Edit Identifier



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Degree Type

Details of Degree Type

General Information

Edit: A - Associates

Coding to specify the kind or type of degree an employee possesses

Identifier

Code* A

State Equivalent 0

Description* Associates

List Description* Associates

Effective Date 1/1/1900

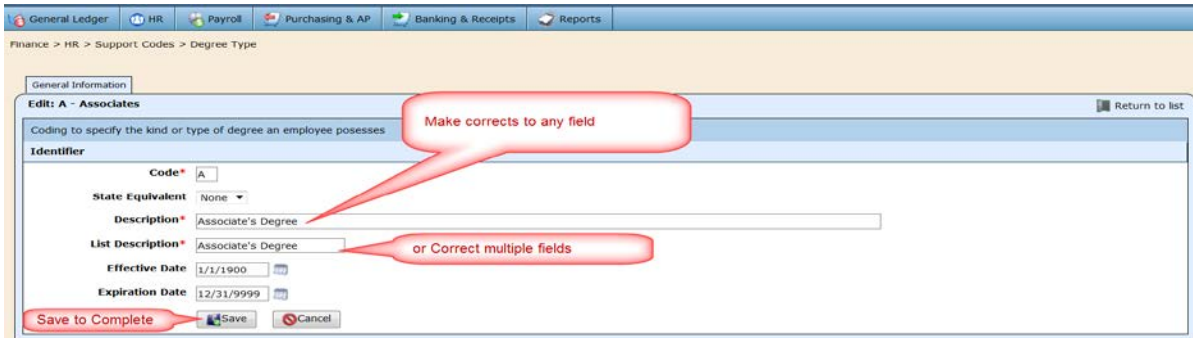
Expiration Date 12/31/9999

Click Edit Identifier

Edit Identifier

Make all necessary corrections.

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Degree Type

General Information

Edit: A - Associates

Coding to specify the kind or type of degree an employee possesses

Identifier

Code* A

State Equivalent None

Description* Associate's Degree

List Description* Associate's Degree

Effective Date 1/1/1900

Expiration Date 12/31/9999

Make corrects to any field

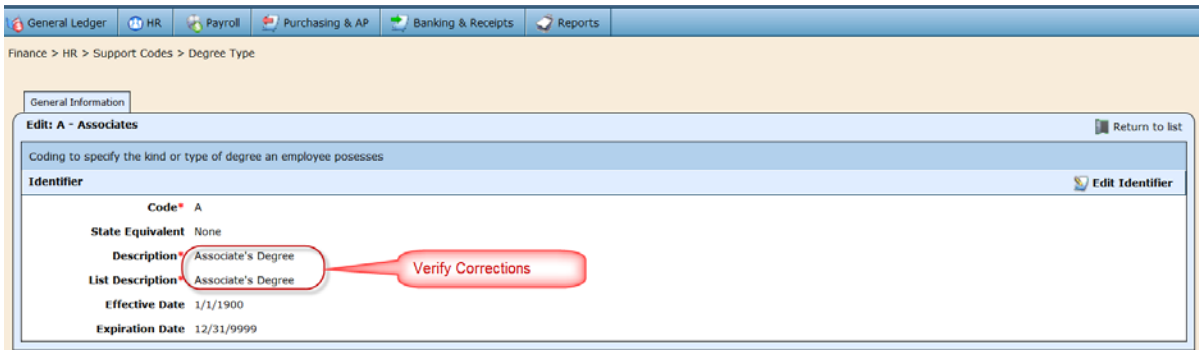
or Correct multiple fields

Save to Complete

Save

Cancel

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



Restore Degree Types

Finance > HR > Support Codes > Degree Type

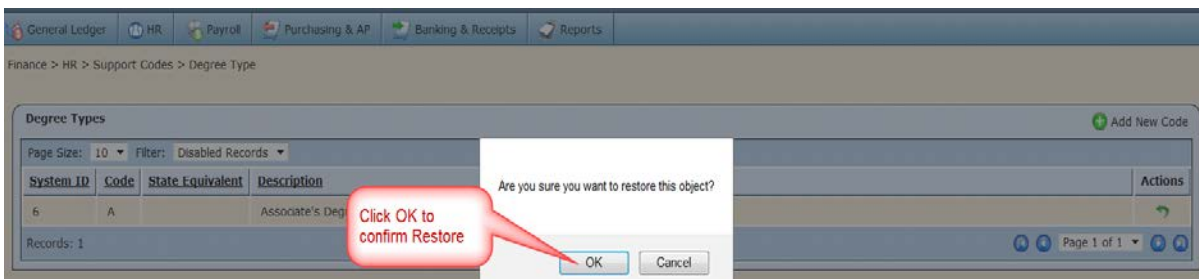
Select Disabled Records from Drop Down Arrow.



Click to Restore



Click **OK** to confirm Restore.



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

Finance > HR > Support Codes > Degree Type

Degree Types Add New Code

Page Size: 10 Filter: Disabled Records

System ID	Code	State Equivalent	Description	Actions
No Degree Types Found				

Records: 0 Page 1 of 1

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

Finance > HR > Support Codes > Degree Type

Degree Types Add New Code

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	0	0	No Degree	[Icons]
2	1	1	Bachelor's	[Icons]
3	2	2	Master's	[Icons]
4	3	3	Doctorate	[Icons]
6	A		Associate's Degree	[Icons]
5	H	0	High School	[Icons]

Records: 6 Page 1 of 1

Change to Active Records

The Restored Degree Type will be shown

Delete Degree Types

Finance > HR > Support Codes > Degree Type

Click next to the degree type that will be deleted.

Finance > HR > Support Codes > Degree Type

Degree Types Add New Code

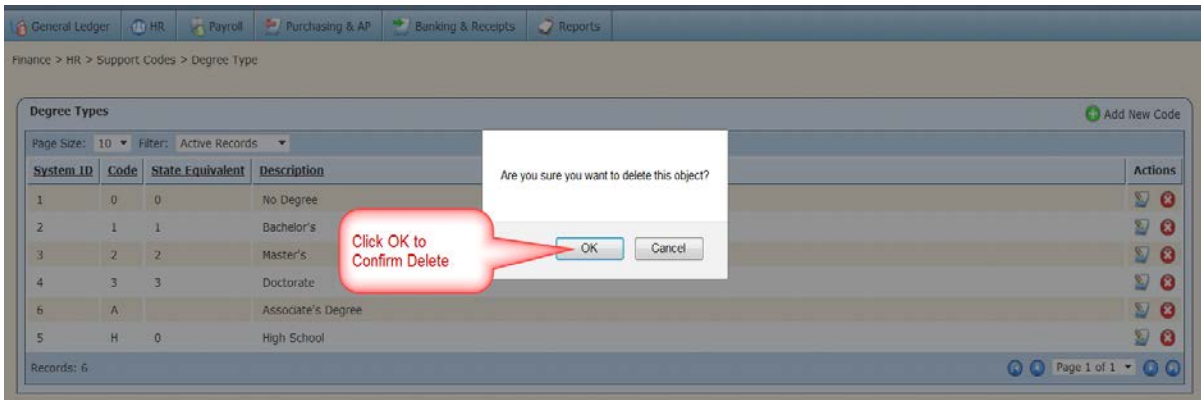
Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	0	0	No Degree	[Icons]
2	1	1	Bachelor's	[Icons]
3	2	2	Master's	[Icons]
4	3	3	Doctorate	[Icons]
6	A		Associate's Degree	[Icons]
5	H	0	High School	[Icons]

Records: 6 Page 1 of 1

Select Degree Type to Delete

Select **OK** to delete.

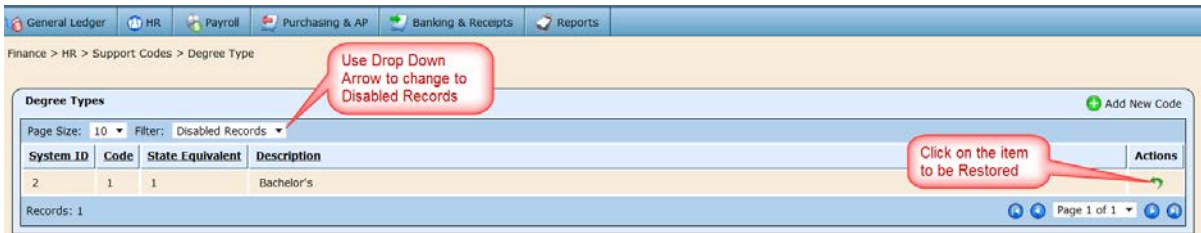


Restore a Degree Type

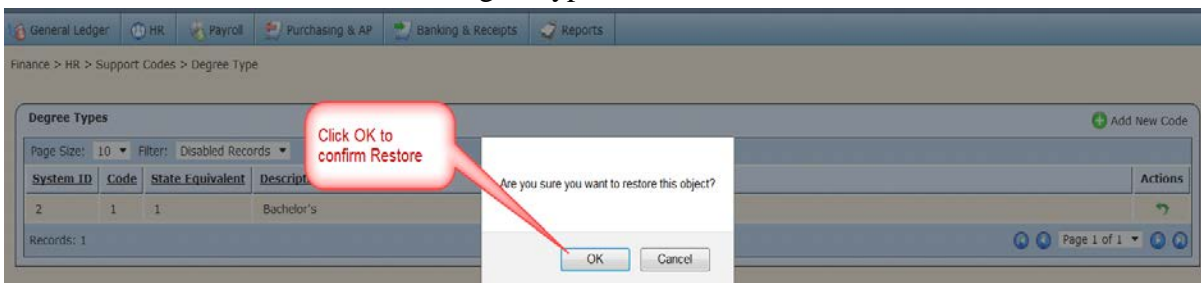
Finance > *HR* > *Support Codes* > *Degree Type*

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Degree Type

Degree Types + Add New Code

Page Size: 10 | Filter: **Disabled Records**

System ID	Code	State Equivalent	Description	Actions
No Degree Types Found				

Records: 0 | Page 1 of 1

The item has been restored to Active Records

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Degree Type

Degree Types + Add New Code

Page Size: 10 | Filter: **Active Records**

System ID	Code	State Equivalent	Description	Actions
1	0	0	No Degree	
2	1	1	Bachelor's	
3	2	2	Master's	
4	3	3	Doctorate	
6	A		Associate's Degree	
5	H	0	High School	

Records: 6 | Page 1 of 1

Use Drop Down Arrow to change to Active Records

The item has been Restored to Active Records

Termination Codes

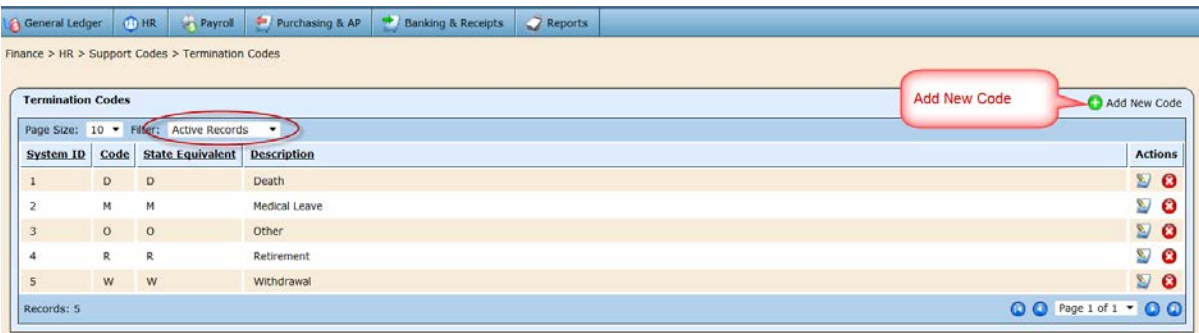
Termination codes are used when an employee leaves the district. Accurate use of termination codes are import for PEIMS and TRAQS reporting.

Finance > HR > Support Codes > Termination Codes

Adding a Termination Code

Finance > HR > Support Codes > Termination Codes

Click  **Add New Code**

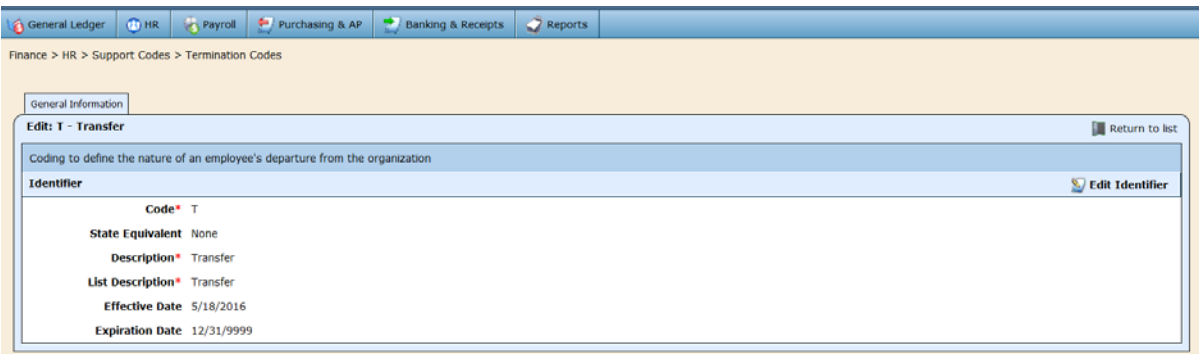


Enter the Code and Description

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.

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

Termination Codes Add New Code

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	D	D	Death	
2	M	M	Medical Leave	
3	O	O	Other	
4	R	R	Retirement	
6	T		Transfer	
5	W	W	Withdrawal	

Records: 6 Page 1 of 1

Editing a Termination Code

Finance > HR > Support Codes > Termination Codes

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

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

Termination Codes Add New Code

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
1	D	D	Death	
2	M	M	Medical Leave	
3	O	O	Other	
4	R	R	Retirement	
6	T		Transfer	
5	W	W	Withdrawal	

Records: 6 Page 1 of 1

Click **Edit Identifier**

General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

General Information

Edit: M - Medical Leave Return to List

Coding to define the nature of an employee's departure from the organization

Identifier

Code* M

State Equivalent M

Description* Medical Leave

List Description* Medical Leave

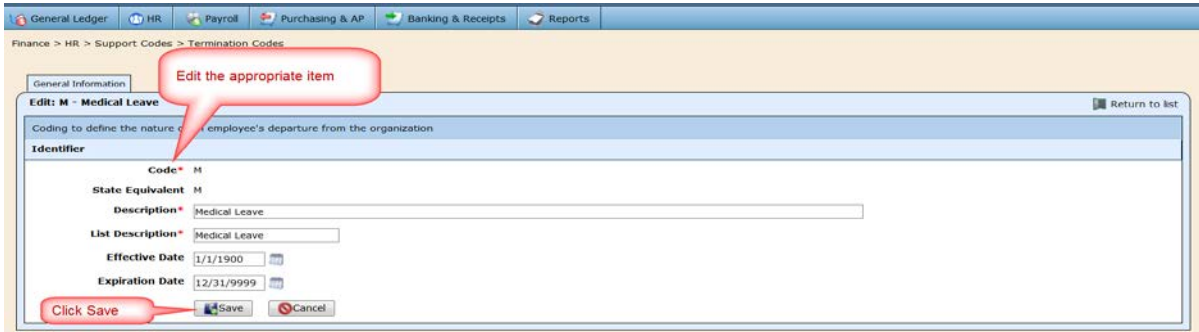
Effective Date 1/1/1900

Expiration Date 12/31/9999

Edit Identifier

Edit the appropriate item

Click  Save



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

General Information

Edit: M - Medical Leave Return to list

Coding to define the nature of an employee's departure from the organization

Identifier

Code* M

State Equivalent M

Description* Medical Leave

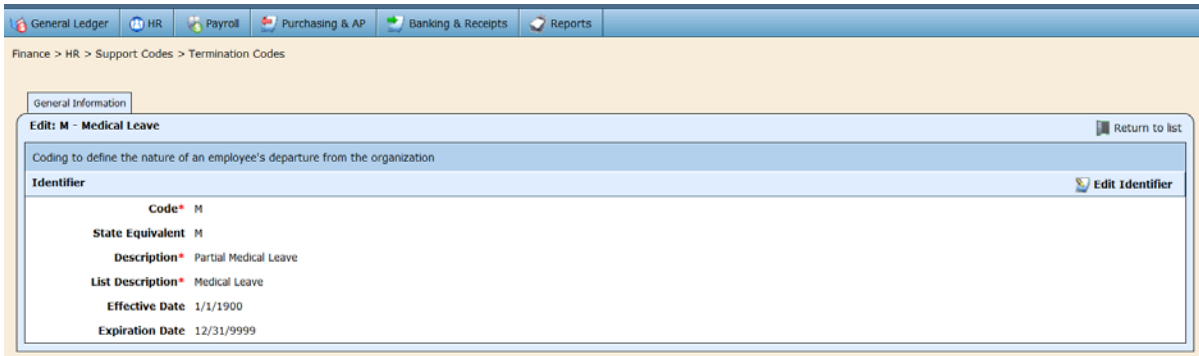
List Description* Medical Leave

Effective Date 1/1/1900

Expiration Date 12/31/9999

Click Save

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



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

General Information

Edit: M - Medical Leave Return to list

Coding to define the nature of an employee's departure from the organization

Identifier Edit Identifier

Code* M

State Equivalent M

Description* Partial Medical Leave

List Description* Medical Leave

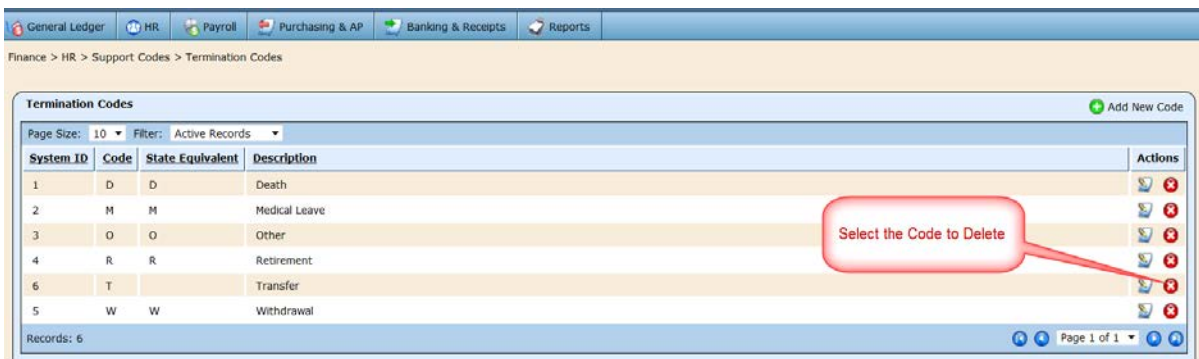
Effective Date 1/1/1900

Expiration Date 12/31/9999

Deleting a Termination Code

Finance > HR > Support Codes > Termination Codes

Click  next to the termination code that will be deleted.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Termination Codes

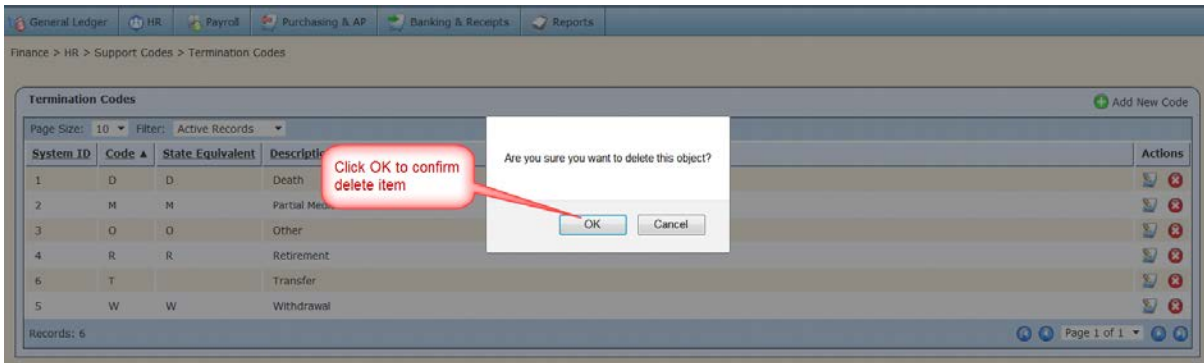
Termination Codes Add New Code

Page Size: 10 Filter: Active Records

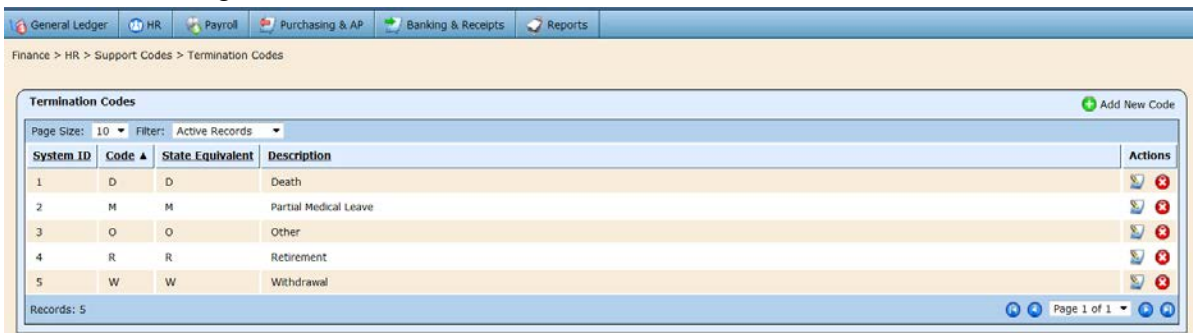
System ID	Code	State Equivalent	Description	Actions
1	D	D	Death	
2	M	M	Medical Leave	
3	O	O	Other	
4	R	R	Retirement	
6	T	T	Transfer	
5	W	W	Withdrawal	

Records: 6 Page 1 of 1

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 active records to disabled records. If this leave type was deleted in error, follow the following steps to restore the leave.

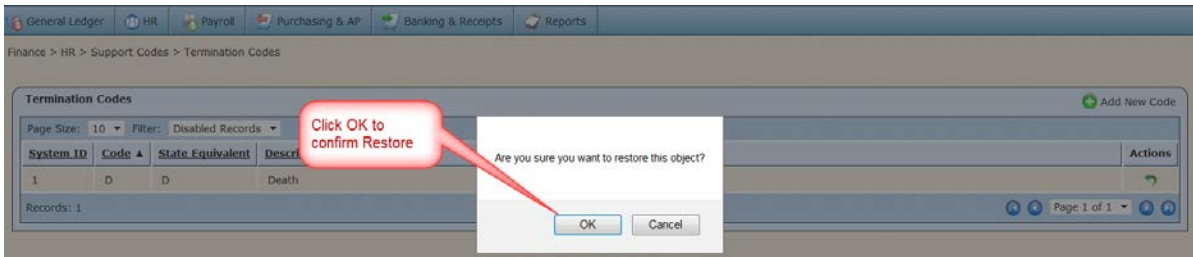
Finance > **HR** > **Support Codes** > **Termination Codes**

Change the Filter to Disabled Records.

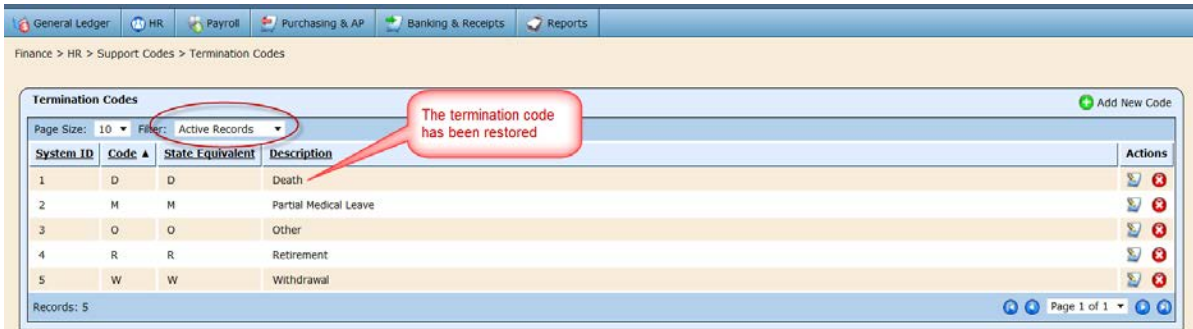
Select  to Restore.



Click OK to confirm restore.



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



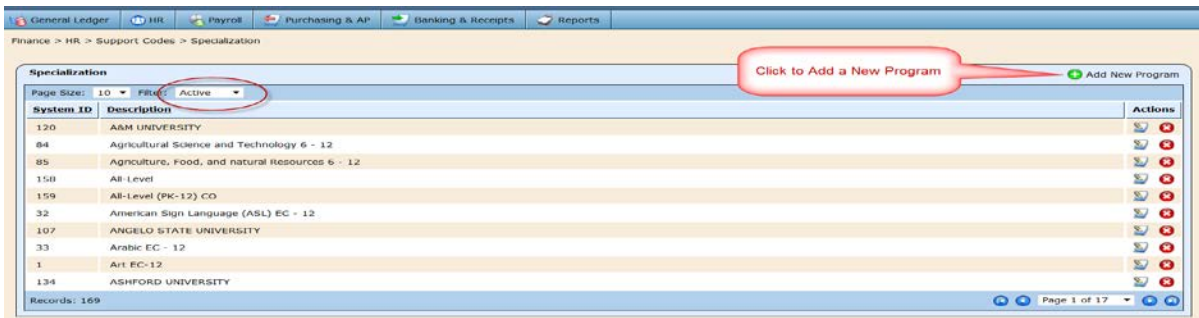
Specialization

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

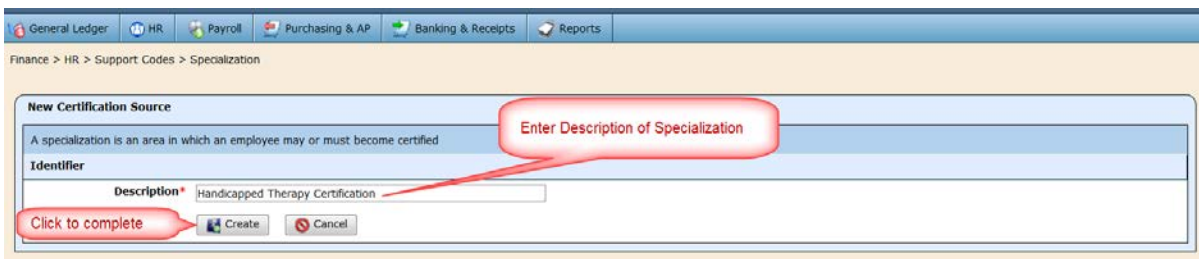
Finance > HR > Support Codes > Specialization

Click  **Add New Program**

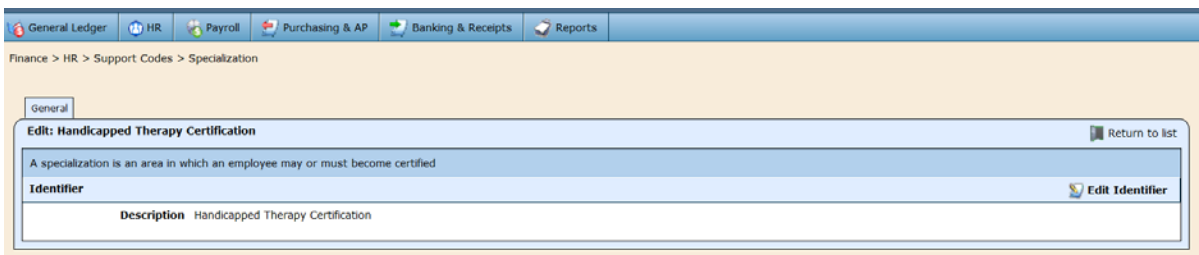


Enter description of specialization.

Click  **Create**




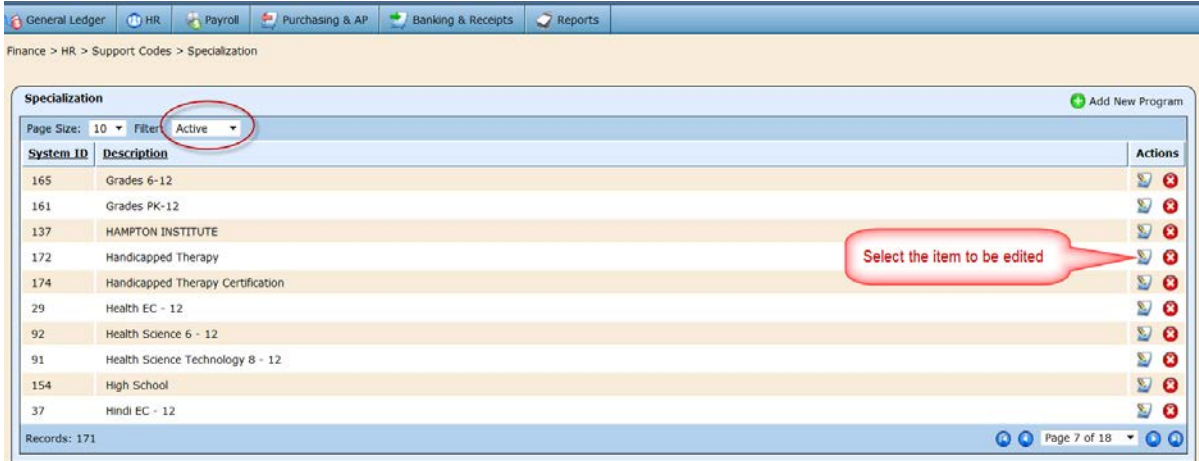
A summary screen will appear. Verify the information is correct.



Edit a Specialization





















Finance > HR > Support Codes > Specialization

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



Specialization

Page Size: 10 Filter: Active

System ID	Description	Actions
165	Grades 6-12	 
161	Grades PK-12	 
137	HAMPTON INSTITUTE	 
172	Handicapped Therapy	 
174	Handicapped Therapy Certification	 
29	Health EC - 12	 
92	Health Science 6 - 12	 
91	Health Science Technology 8 - 12	 
154	High School	 
37	Hindi EC - 12	 

Records: 171 Page 7 of 18

Click  **Edit Identifier**



General

Edit: Handicapped Therapy

A specialization is an area in which an employee may or must become certified

Identifier

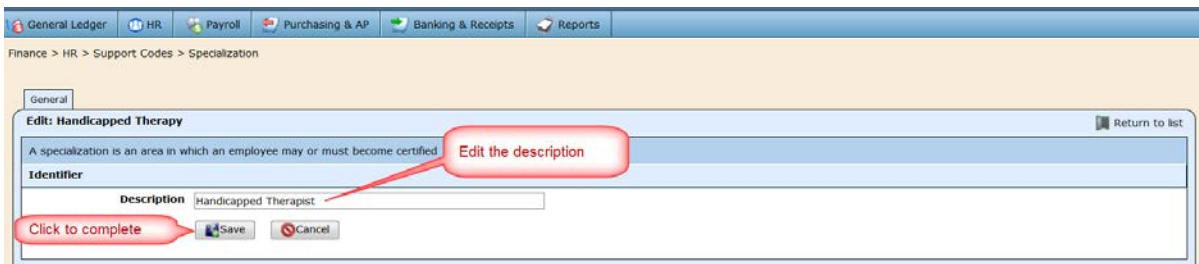
Description
Handicapped Therapy

Return to list

Click to Edit Identifier

Correct the description.

Click  **Save**



General

Edit: Handicapped Therapy

A specialization is an area in which an employee may or must become certified

Identifier

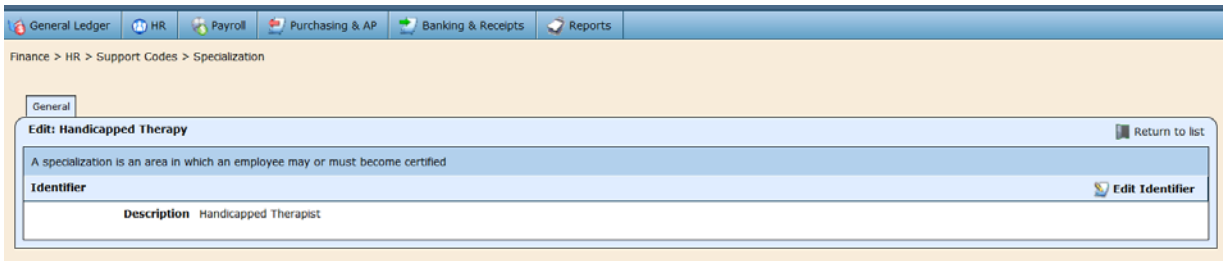
Description
Handicapped Therapist

Save Cancel

Edit the description

Click to complete


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

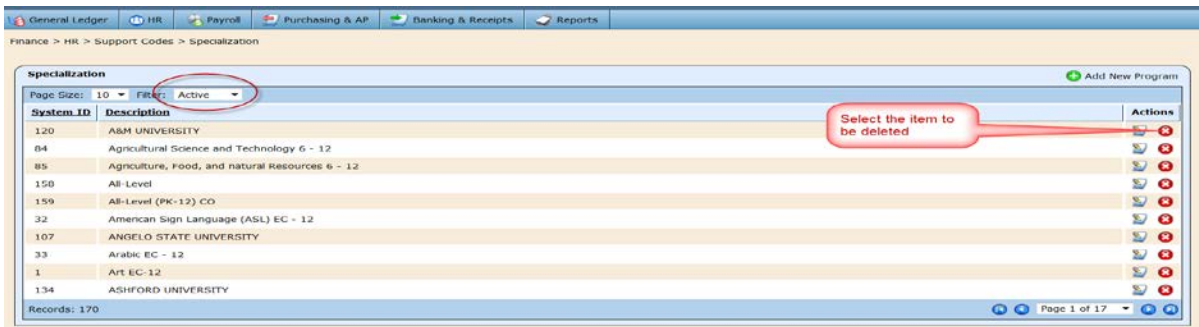


Delete a Specialization

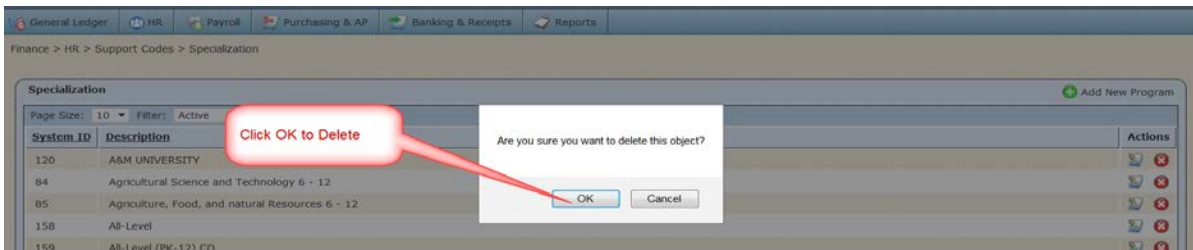
If a Specialization has never been used, it will be deleted permanently and cannot be restored and must be added as a New Specialization.

Finance > HR > Support Codes > Degree Type

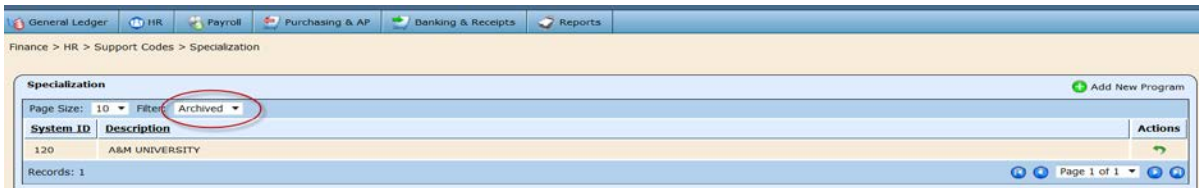
Click  next to the specialization that will be deleted.



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




General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Specialization

Specialization + Add New Program

Page Size: 10 Filter: Archived

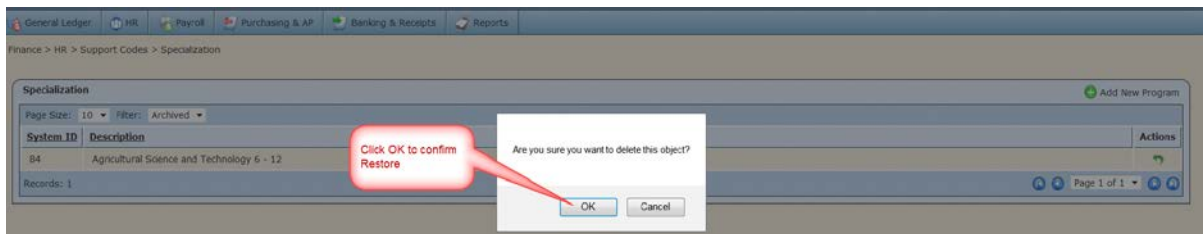
System ID	Description	Actions
120	A&M UNIVERSITY	

Records: 1 Page 1 of 1

Use Drop Down Arrow to Change to Archived Records

Click to Restore

Click OK to Confirm the Restore.




General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Specialization

Specialization + Add New Program

Page Size: 10 Filter: Archived

System ID	Description	Actions
84	Agricultural Science and Technology 6 - 12	

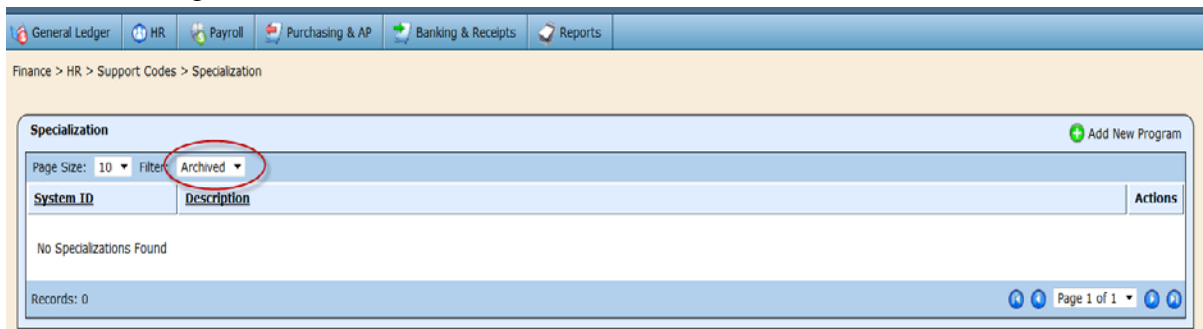
Records: 1 Page 1 of 1

Click OK to confirm Restore

Are you sure you want to delete this object?

OK Cancel

The item is no longer in the Archived Records.



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Specialization

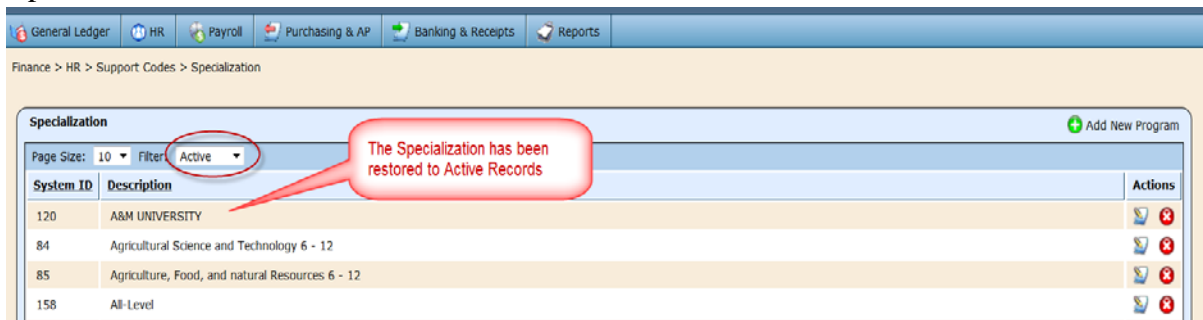
Specialization + Add New Program

Page Size: 10 Filter: Archived

System ID	Description	Actions
No Specializations Found		

Records: 0 Page 1 of 1

The specialization has been restored to Active Records.











General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Specialization

Specialization + Add New Program

Page Size: 10 Filter: Active

System ID	Description	Actions
120	A&M UNIVERSITY	 
84	Agricultural Science and Technology 6 - 12	 
85	Agriculture, Food, and natural Resources 6 - 12	 
158	All-Level	 

The Specialization has been restored to Active Records

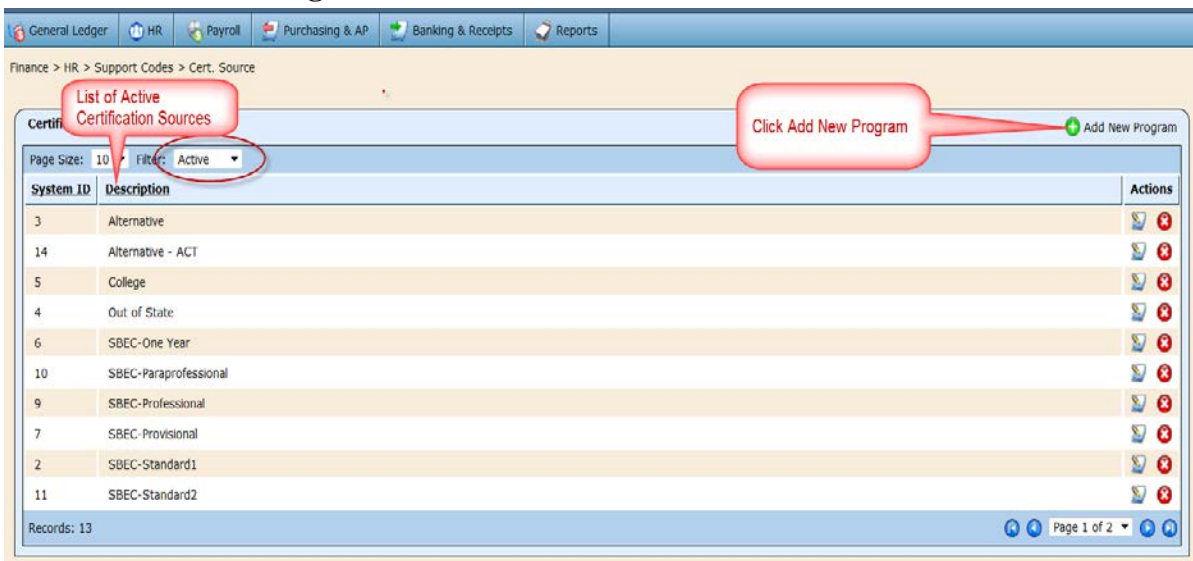
Certification Source

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**



Finance > HR > Support Codes > Cert. Source

List of Active Certification Sources

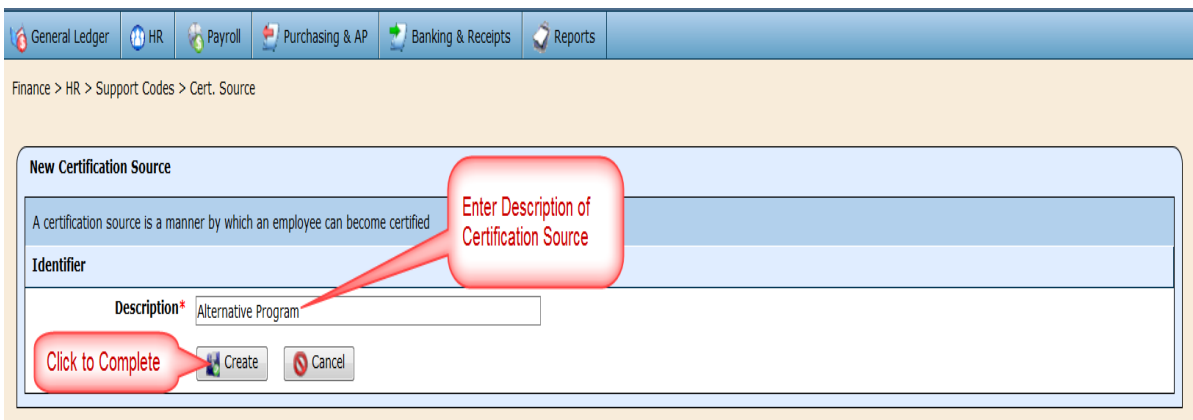
Click Add New Program

System ID	Description	Actions
3	Alternative	
14	Alternative - ACT	
5	College	
4	Out of State	
6	SBEC-One Year	
10	SBEC-Paraprofessional	
9	SBEC-Professional	
7	SBEC-Provisional	
2	SBEC-Standard1	
11	SBEC-Standard2	

Records: 13 Page 1 of 2

Enter description, or name, of the Certification source.

Click  **Create**



Finance > HR > Support Codes > Cert. Source

New Certification Source

A certification source is a manner by which an employee can become certified

Identifier

Description* Alternative Program

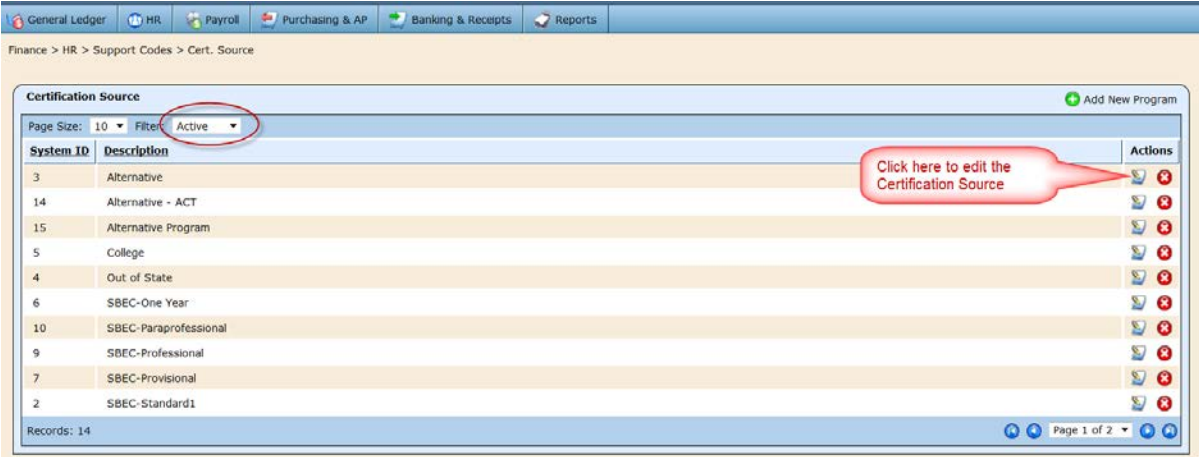
Enter Description of Certification Source

Click to Complete

Edit a Certification Source

Finance > HR > Support Codes > Cert. Source

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



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Cert. Source

Certification Source Add New Program

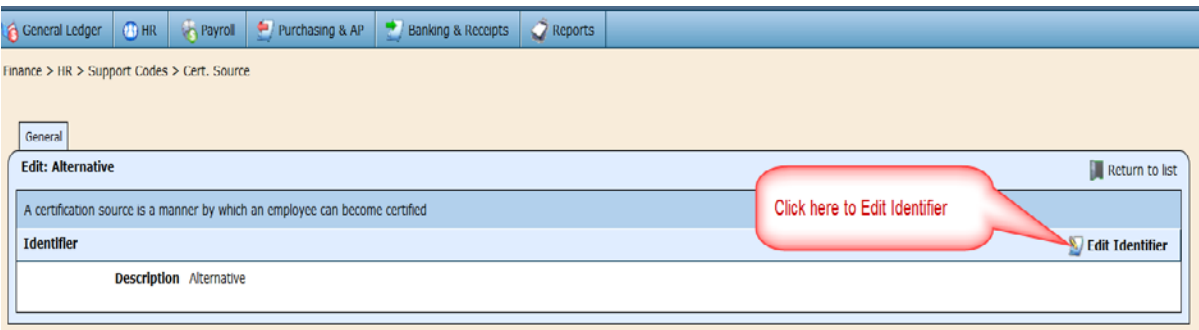
Page Size: 10 Filter: Active

System ID	Description	Actions
3	Alternative	
14	Alternative - ACT	
15	Alternative Program	
5	College	
4	Out of State	
6	SBEC-One Year	
10	SBEC-Paraprofessional	
9	SBEC-Professional	
7	SBEC-Provisional	
2	SBEC-Standard1	

Records: 14 Page 1 of 2

Click here to edit the Certification Source

Click  **Edit Identifier**



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Cert. Source

General

Edit: Alternative Return to list

A certification source is a manner by which an employee can become certified

Identifier

Description Alternative

Click here to Edit Identifier

Edit Identifier

Correct the description field.

Click  **Save**



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Cert. Source

General

Edit: Alternative Return to list

A certification source is a manner by which an employee can become certified

Identifier

Description Alternative Program

Make Correction


Return to List to verify Description has been corrected

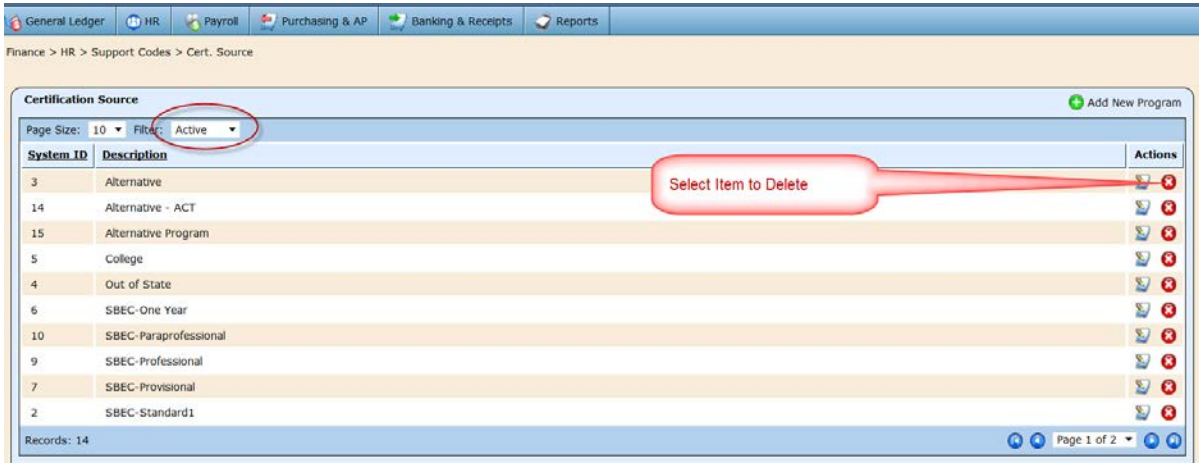
Click to Complete

Return to List to verify the item has been corrected.

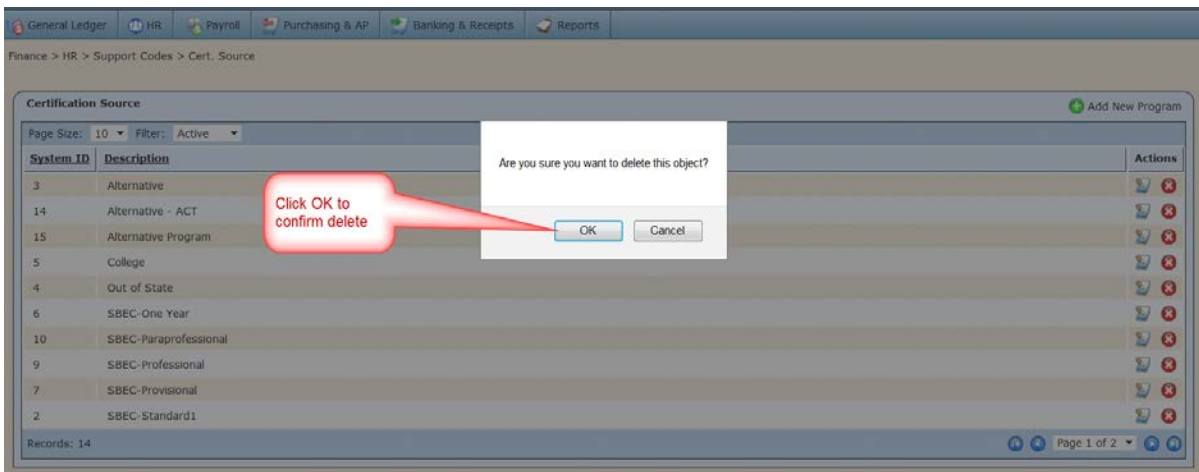
Delete a Certification Source

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.

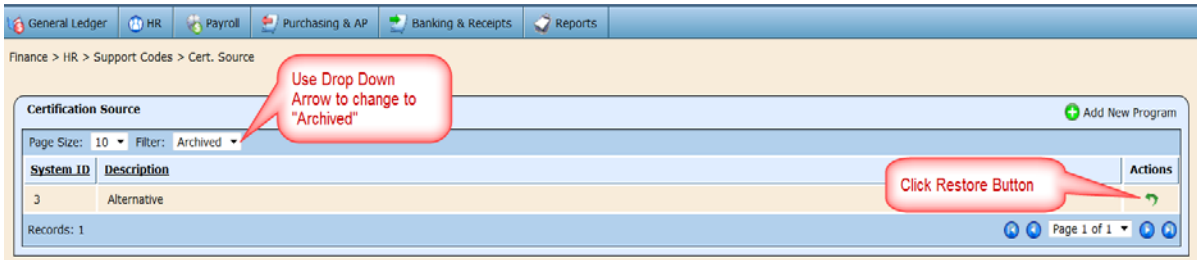


Restore a Certification Source

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




General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Cert. Source

Certification Source + Add New Program

Page Size: 10 | Filter: Archived

System ID	Description	Actions
3	Alternative	

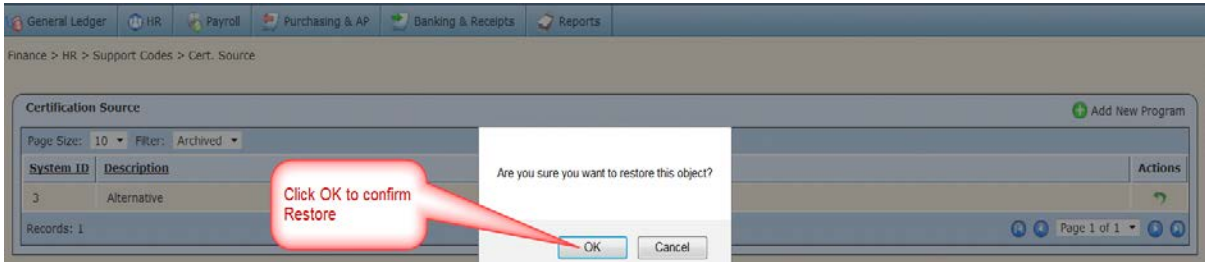
Records: 1

Page 1 of 1

Use Drop Down Arrow to change to "Archived"

Click Restore Button

Click OK to confirm the Restore




General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Cert. Source

Certification Source + Add New Program

Page Size: 10 | Filter: Archived

System ID	Description	Actions
3	Alternative	

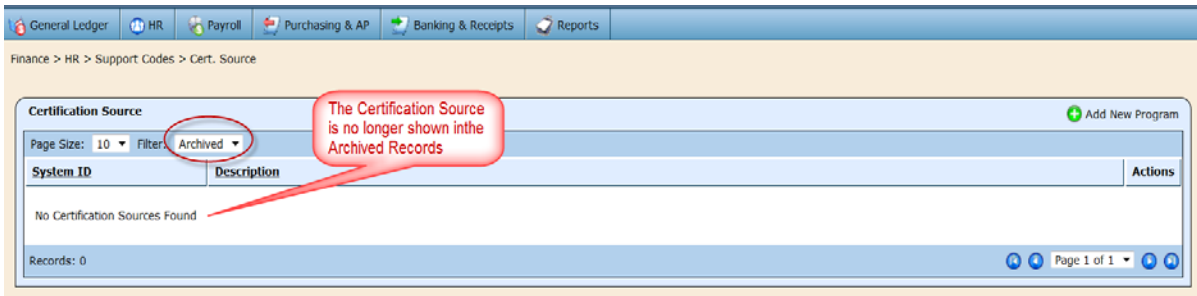
Records: 1

Page 1 of 1

Are you sure you want to restore this object?

Click OK to confirm Restore

The item has been removed from the Archived records.



General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Cert. Source

Certification Source + Add New Program

Page Size: 10 | Filter: Archived

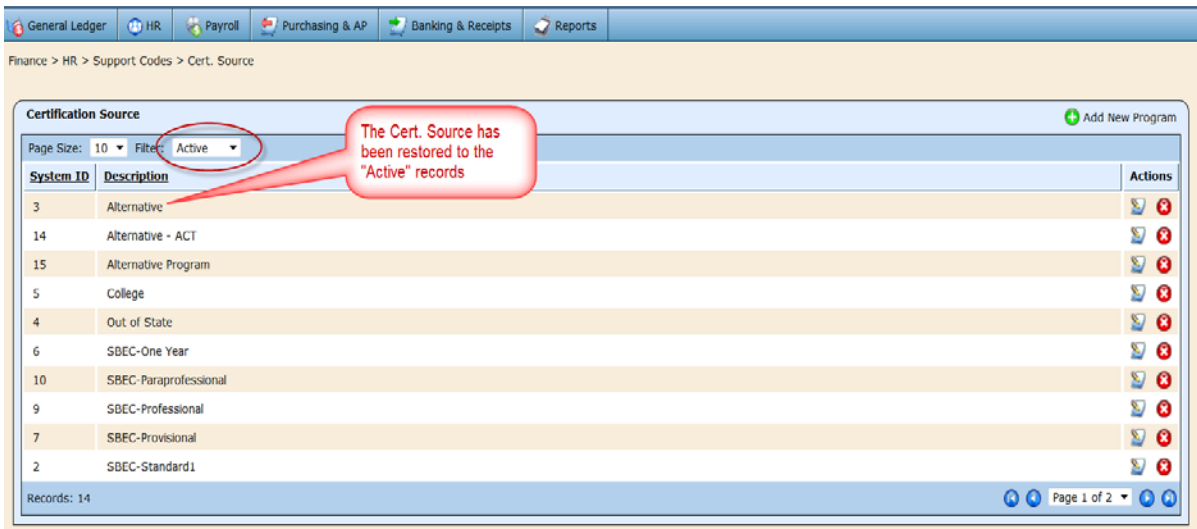
System ID	Description	Actions
No Certification Sources Found		

Records: 0

Page 1 of 1

The Certification Source is no longer shown in the Archived Records

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























General Ledger | HR | Payroll | Purchasing & AP | Banking & Receipts | Reports

Finance > HR > Support Codes > Cert. Source

Certification Source + Add New Program

Page Size: 10 | Filter: Active

System ID	Description	Actions
3	Alternative	 
14	Alternative - ACT	 
15	Alternative Program	 
5	College	 
4	Out of State	 
6	SBEC-One Year	 
10	SBEC-Paraprofessional	 
9	SBEC-Professional	 
7	SBEC-Provisional	 
2	SBEC-Standard1	 

Records: 14

Page 1 of 2

The Cert. Source has been restored to the "Active" records

Background Checks

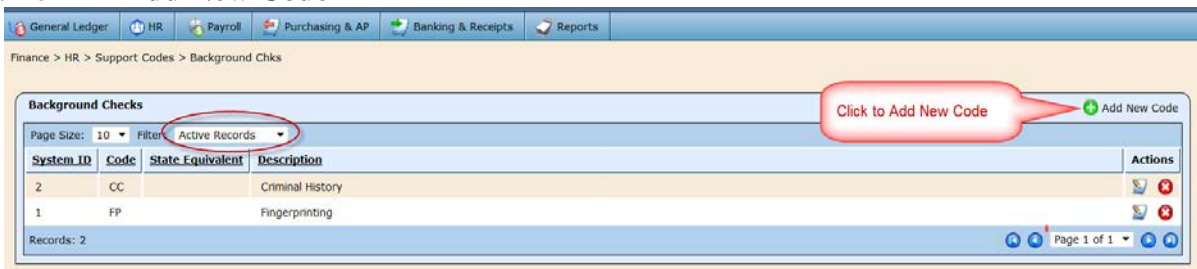
Background Checks is designed to maintain code tables for locally defined Background Checks for employees relative to new hiring screening and other checks.

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

Adding a Background checks

Finance > HR > Support Codes > Background Checks

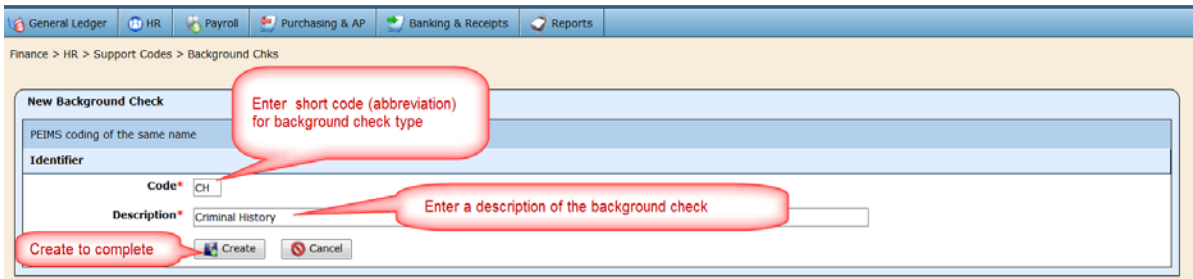
Click on  **Add New Code**



- **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.

General Information

Edit: CH - Criminal History Return to list

PEIMS coding of the same name

Identifier Edit Identifier

Code* CH

State Equivalent None

Description* Criminal History

List Description* Criminal History

Effective Date 4/27/2016

Expiration Date 12/31/9999

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.

Background Checks Add New Code

Page Size: 10 Filter: Active Records

System_ID	Code	State Equivalent	Description	Actions
2	CC		Criminal History	 
1	FP		Fingerprinting	 

Records: 2 Page 1 of 1

Click  **Edit Identifier**

General Information

Edit: CH - Criminal History Return to list

PEIMS coding of the same name

Identifier Edit Identifier

Code* CH

State Equivalent None

Description* Criminal History

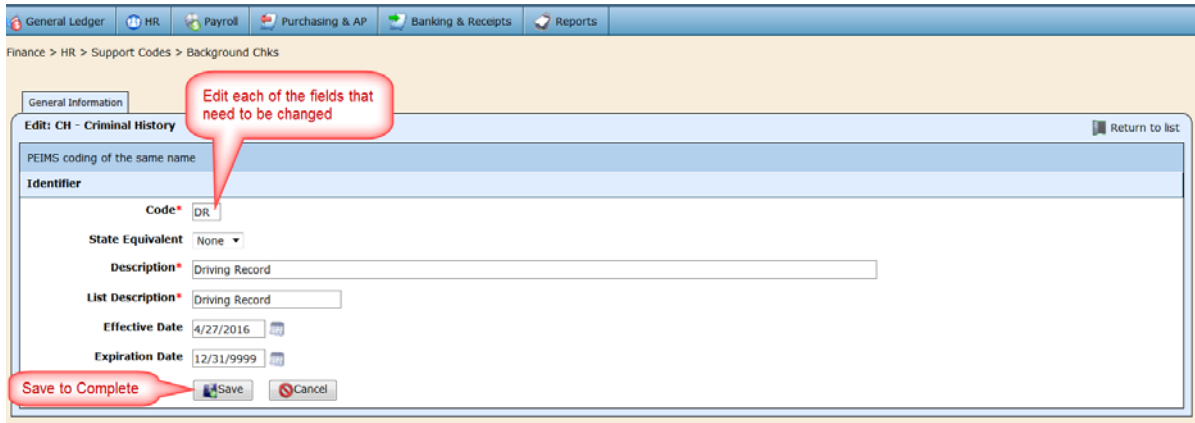
List Description* Criminal History

Effective Date 4/27/2016

Expiration Date 12/31/9999

Correct the appropriate files.

Click  Save



General Information

Edit: CH - Criminal History Return to list

PEIMS coding of the same name

Identifier

Code* DR

State Equivalent None

Description* Driving Record

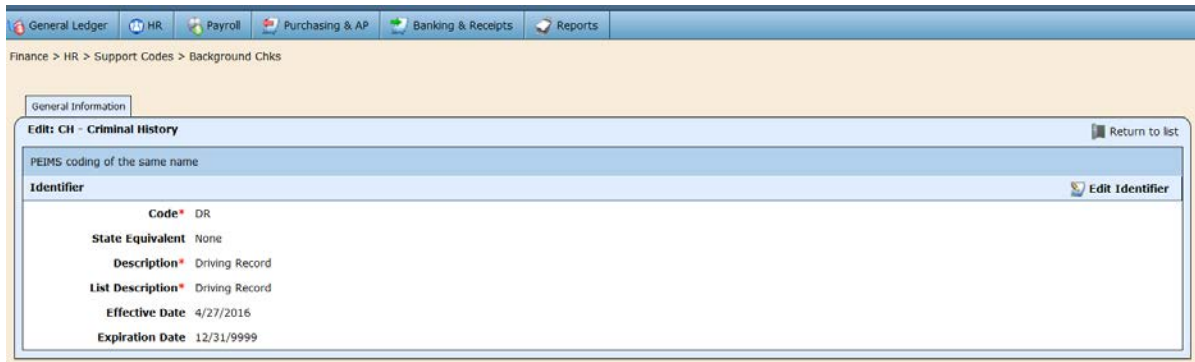
List Description* Driving Record

Effective Date 4/27/2016

Expiration Date 12/31/9999

Save to Complete

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



General Information

Edit: CH - Criminal History Return to list

PEIMS coding of the same name

Identifier Edit Identifier

Code* DR

State Equivalent None

Description* Driving Record

List Description* Driving Record

Effective Date 4/27/2016

Expiration Date 12/31/9999

Delete a Background Check

Finance > HR > Support Codes > Background Checks



General Ledger HR Payroll Purchasing & AP Banking & Receipts Reports

Finance > HR > Support Codes > Background Chks

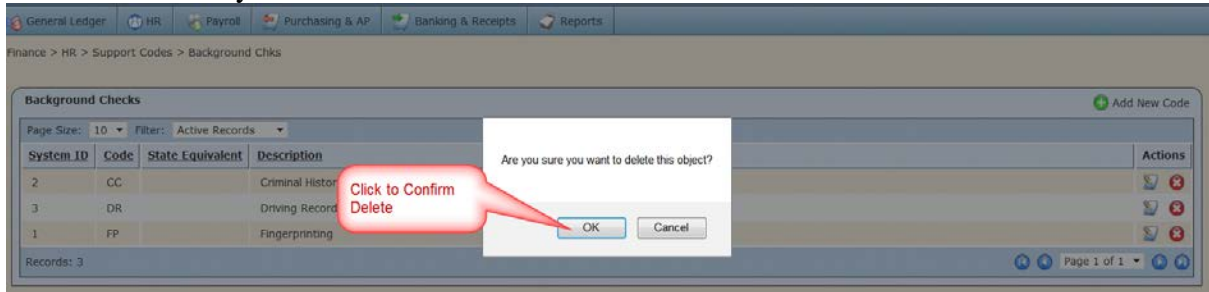
Background Checks Add New Code

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
2	CC		Criminal History	
3	DR		Driving Record	
1	FP		Fingerprinting	

Records: 3 Page 1 of 1

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



The item has been removed from Active Records



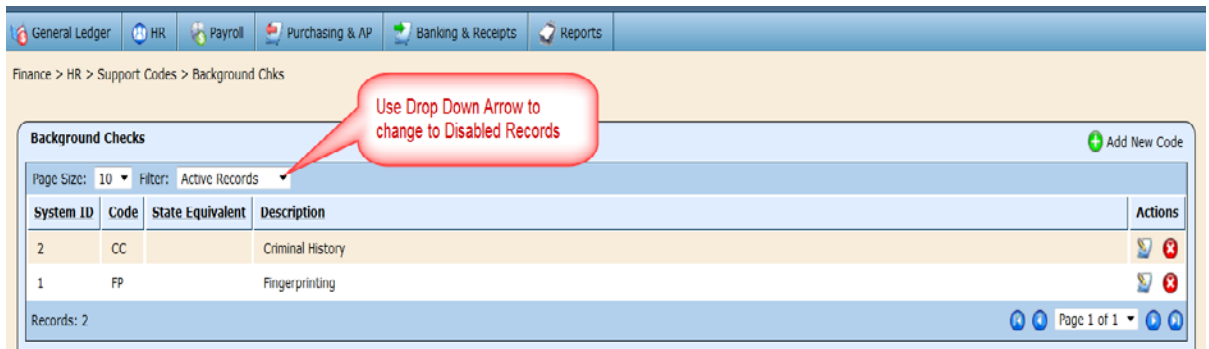
Restore a Deleted Background Check

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.

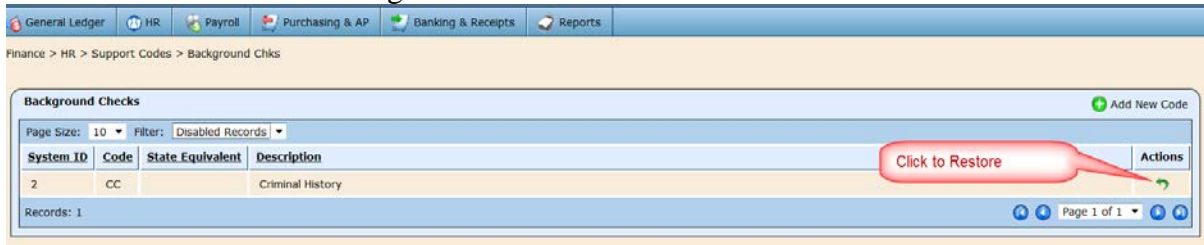
Finance > HR > Support Codes > Background Checks

Active Records




Disabled Records

Click on  to restore the background check.



Background Checks

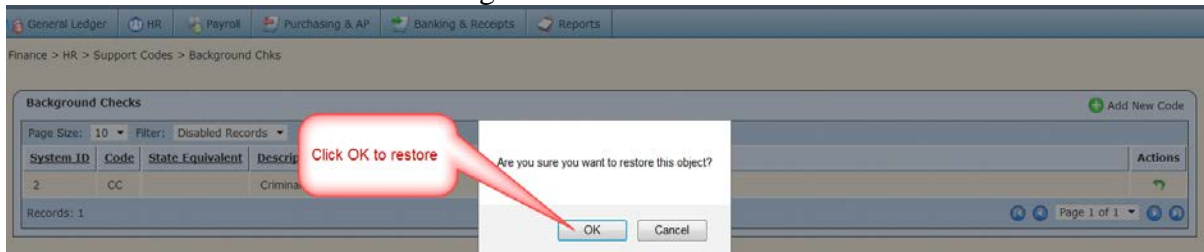
Page Size: 10 Filter: Disabled Records

System ID	Code	State Equivalent	Description	Actions
2	CC		Criminal History	

Records: 1


Page 1 of 1

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



Background Checks

Page Size: 10 Filter: Disabled Records

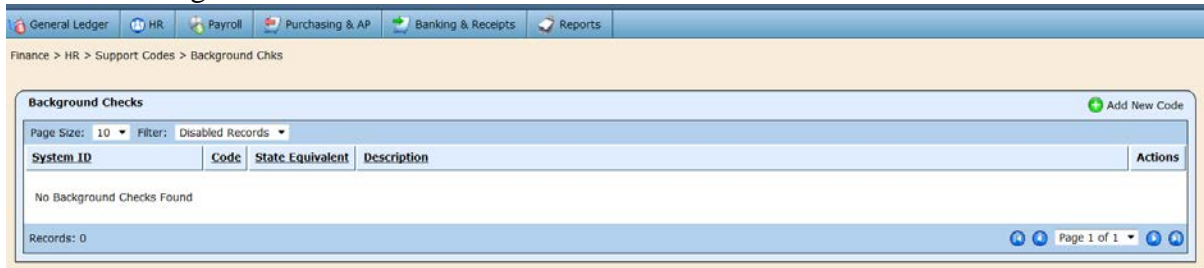
System ID	Code	State Equivalent	Description	Actions
2	CC		Criminal History	

Records: 1

Page 1 of 1

Are you sure you want to restore this object?

The item is no longer shown in the Disabled Records.



Background Checks

Page Size: 10 Filter: Disabled Records

System ID	Code	State Equivalent	Description	Actions
No Background Checks Found				

Records: 0

Page 1 of 1

The item has been restored to Active Records.



Background Checks

Page Size: 10 Filter: Active Records

System ID	Code	State Equivalent	Description	Actions
2	CC		Criminal History	 
4	DR		Driving Record	 
1	FP		Fingerprinting	 

Records: 3

Page 1 of 1

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 on the Payroll tab

Click on the Positions

System ID	Period	District	Contract Dates	ACA	Days	% of Day	Positions	Actions
5284	2015-2016		8/17/2015 - 6/4/2016	1A	187 / 187	100%	5 Position(s)	

- Click to edit Position to update the wage allocation

Click on edit button on the Position to edit the allocation

System ID	Calendar	Name	PAC/DE	Sch Wrk Days	Coding	Calculation	Actions
8604 (*)	Standard Calendar	Maint & Custodial District Wide (03)	80 / N	239.00 / 239	199-51-6129.00-999-?-99-0-00 (100.00%)	100.00% @ 18,738.00 per year	
8603 (*)	Standard Calendar	Maint & Custodial Hourly (03)	80 / Y	239.00 / 239	199-51-6129.00-999-?-99-0-00 (100.00%)	0.00% @ 9.80 per hour	
8602 (*)	Standard Calendar	Maint OT (03)	80 / Y	239.00 / 239	199-51-6129.00-999-?-99-0-00 (100.00%)	0.00% @ 14.70 per hour	

- **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.
 - 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

The screenshot shows the 'Coding Allocations' section with a dropdown set to '4'. Below are four rows for 'Coding Allocation 1*' through '4*'. Each row contains several dropdown menus for account codes and a text input field for a percentage. Callouts indicate that the user can select up to 4 allocations and enter percentages for each line code.

Allocation	Code 1	Code 2	Code 3	Code 4	Code 5	Code 6	Code 7	Code 8	Code 9	Code 10	Percentage
Coding Allocation 1*	211	11	6119	00	101	?	24	0	00	00	70.00
Coding Allocation 2*	224	11	6119	00	101	?	23	0	00	00	10.00
Coding Allocation 3*	263	11	6119	00	101	?	25	0	00	00	10.00
Coding Allocation 4*	211	11	6119	00	041	?	24	0	00	00	10.00

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

The screenshot shows the 'Coding Allocations' section with a dropdown set to '2'. Below are two rows for 'Coding Allocation 1*' and '2*'. Each row contains several dropdown menus for account codes and a text input field for a percentage. Below these is an 'Overtime Object*' dropdown menu. A callout indicates that the user may now select an overtime object code if they prefer to expense to a separate code.

Allocation	Code 1	Code 2	Code 3	Code 4	Code 5	Code 6	Code 7	Code 8	Code 9	Code 10	Percentage
Coding Allocation 1*	211	11	6129	00	101	?					50.00
Coding Allocation 2*	211	11	6129	00	041	?					50.00

Overtime Object*: 6121 - Extra Duty Pay/Overtime - Support Personnel

- **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.

The screenshot displays the 'Add Contract' form for employee Lisandra Barnell. The form is organized into several sections:

- Demographics:** Barnell, Lisandra
- Employment Contract:**
 - Placement Type*: FTE
 - District*: Demo District 1 - 000001
 - Instructional Period*: 2016-2017 School Year
- Contract Terms:**
 - Contract Days*: 187
 - Contract Begin*: 8/1/2016
 - Contract End*: 7/31/2017
 - Status*: *- Active
- Contract Attributes:**
 - Primary Role*: Assistant Principal (11 Month - 202 Days)
 - Percent Of Day*: 0
 - Pay Step*: 0
 - Local Experience*: 0
 - Prof. Experience*: 3
 - ACA Offer*: 1A - Qualifying Offer
- Payment Attributes:**
 - Incl Addl Pmt*: True - provide additional pay period (highlighted with a red callout)
 - Statutory Tax Status*: State Retirement and Medicare Eligible
 - FUTA Exempt*: False - FUTA Taxes apply to this employee
 - SUTA Exempt*: False - SUTA Taxes apply to this employee
 - Overtime Exempt*: True - Employee IS NOT eligible for overtime

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Callout Box Text:
This feature allows the payroll clerk to assign 13 checks to an employee's payment schedule.
Incl Addl Pmt: Select the True - provide additional pay period

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

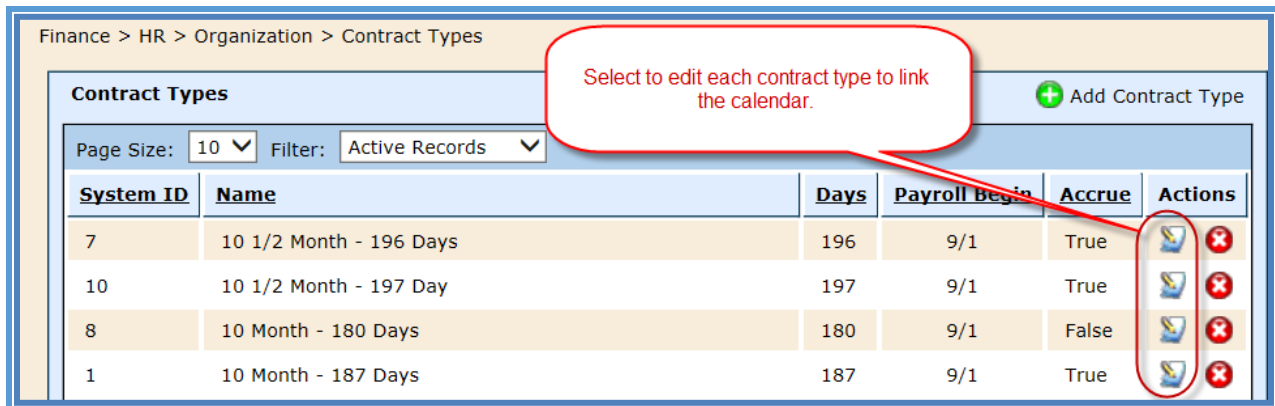
_____ STEP 9 – *Reports* Tab – this allows you to run reports. Not required for New Employee Setup.

What's New for TRS 2016

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




Finance > HR > Organization > Contract Types

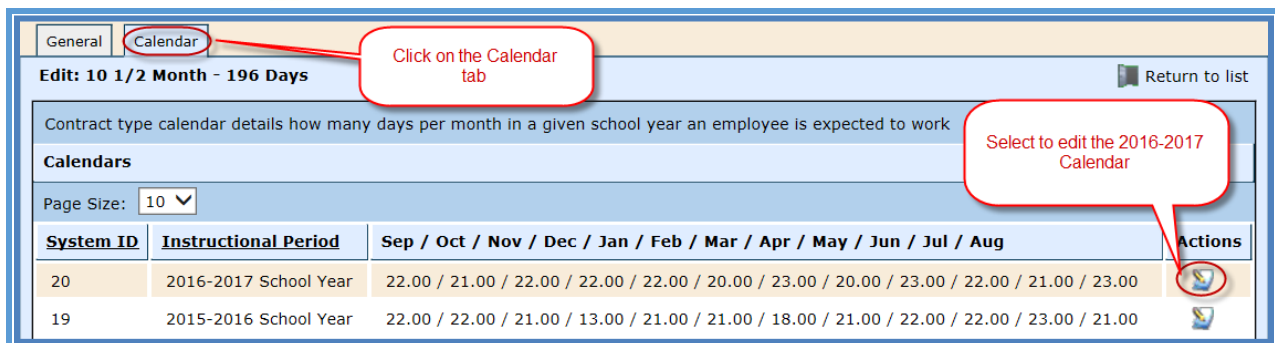
Contract Types + Add Contract Type

Page Size: 10 Filter: Active Records

System ID	Name	Days	Payroll Begin	Accrue	Actions
7	10 1/2 Month - 196 Days	196	9/1	True	 
10	10 1/2 Month - 197 Day	197	9/1	True	 
8	10 Month - 180 Days	180	9/1	False	 
1	10 Month - 187 Days	187	9/1	True	 

Select to edit each contract type to link the calendar.

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





General **Calendar** Return to list

Edit: 10 1/2 Month - 196 Days

Contract type calendar details how many days per month in a given school year an employee is expected to work

Calendars

Page Size: 10

System ID	Instructional Period	Sep / Oct / Nov / Dec / Jan / Feb / Mar / Apr / May / Jun / Jul / Aug	Actions
20	2016-2017 School Year	22.00 / 21.00 / 22.00 / 22.00 / 22.00 / 20.00 / 23.00 / 20.00 / 23.00 / 22.00 / 21.00 / 23.00	
19	2015-2016 School Year	22.00 / 22.00 / 21.00 / 13.00 / 21.00 / 21.00 / 18.00 / 21.00 / 22.00 / 22.00 / 23.00 / 21.00	

Click on the Calendar tab

Select to edit the 2016-2017 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.

Additional Errors: Property: 2016-2017 School Year Calendar
 *Work days must equal 187 but were 186.00

Save Cancel

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

General Calendar

Edit: 10 1/2 Month - 196 Days Return to list

Default Work Days 2016-2017 School Year

September*	22.00
October*	21.00
November*	22.00
December*	22.00
January*	22.00
February*	20.00
March*	23.00
April*	20.00
May*	23.00
June*	22.00
July*	21.00
August*	23.00


Enter the # of days expected to work each month for this Contract Type.

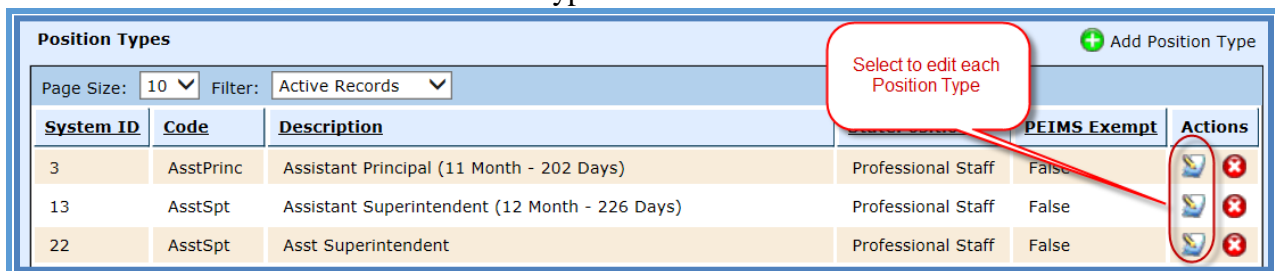
Select Save







Save Cancel


Enter Hours Per Day on the Position Types

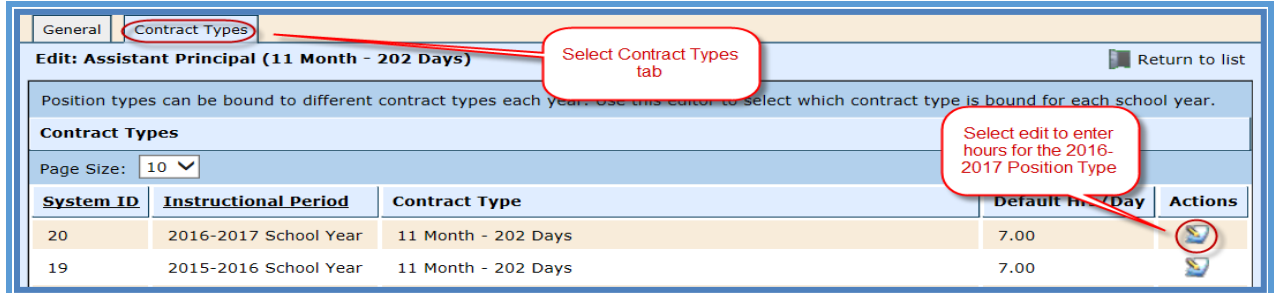
Position Types manage default hours per Contract Type for TRS reporting. There may be multiple Position Types set up in WebSmart based on the number percentage of Contract Days. For example, if your school, has 3 counselor positions, but they each have a different number of contract days, you may see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



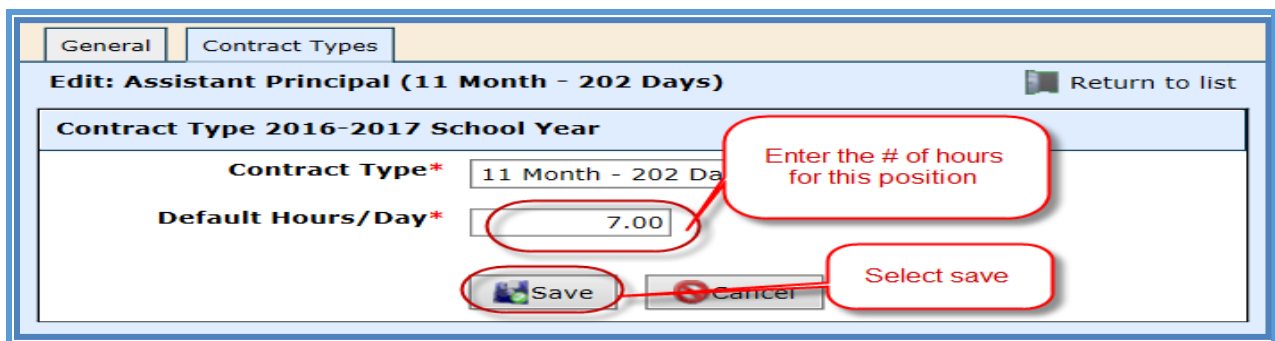
System ID	Code	Description	Professional Staff	PEIMS Exempt	Actions
3	AsstPrinc	Assistant Principal (11 Month - 202 Days)	Professional Staff	False	 
13	AsstSpt	Assistant Superintendent (12 Month - 226 Days)	Professional Staff	False	 
22	AsstSpt	Asst Superintendent	Professional Staff	False	 

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



System ID	Instructional Period	Contract Type	Default Hours/Day	Actions
20	2016-2017 School Year	11 Month - 202 Days	7.00	
19	2015-2016 School Year	11 Month - 202 Days	7.00	

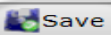
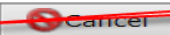
- Enter the number percent of hours per day the employee is scheduled to work
- Select Save
- Select Return to List and repeat for each Position Type



Contract Type 2016-2017 School Year

Contract Type* 11 Month - 202 Da

Default Hours/Day* 7.00

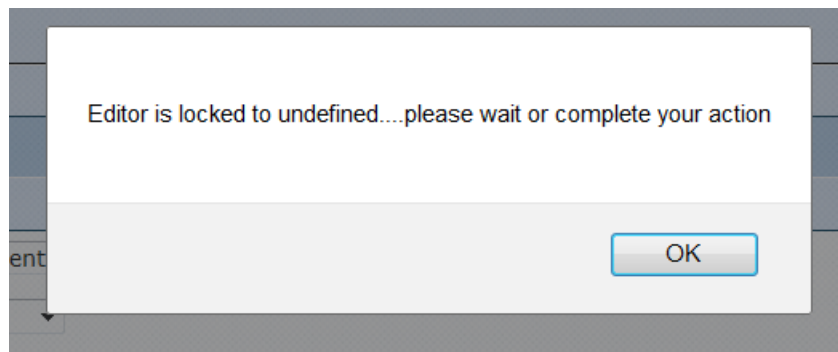
Error Codes

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 if 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 <i>at the district</i> .
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.