

PERSONNEL SYSTEM – SETUP AND USE

1.1 Enter your assigned login name, district number, password and fiscal year.

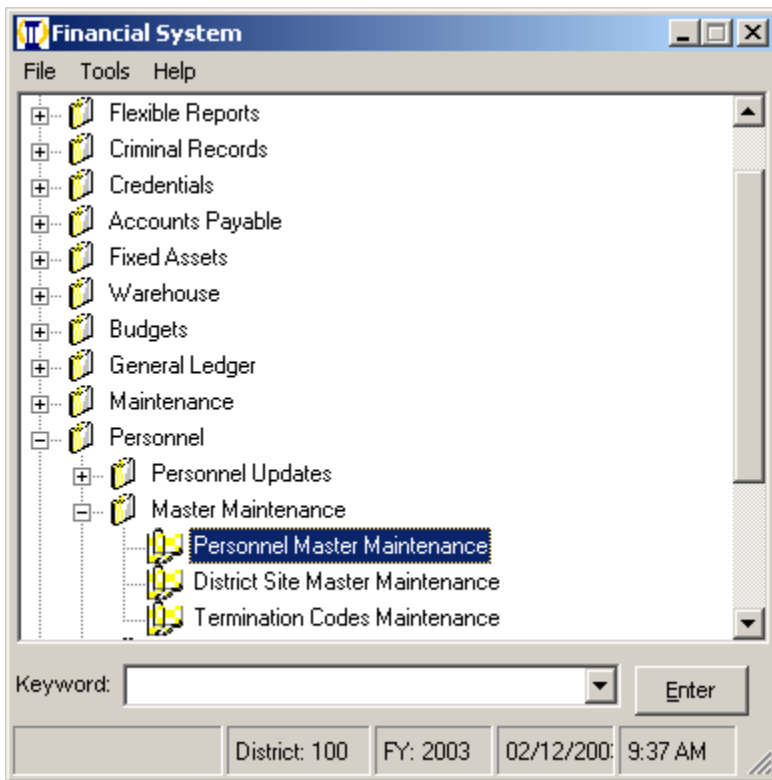
Note: Fiscal year defaults to the current year.



The screenshot shows a 'Login' dialog box with a blue title bar. It contains four input fields: 'Login', 'District', 'Password', and 'FY'. The 'FY' field is pre-filled with the value '2003'. Below the input fields are two buttons: 'Enter' and 'Cancel'.

Illustration 1.1

1.2 Select *Personnel Master Maintenance* from the *Personnel/Master Maintenance* menu.



The screenshot shows the 'Financial System' application window. The menu bar includes 'File', 'Tools', and 'Help'. A tree view on the left lists various system components. The 'Personnel' folder is expanded, showing 'Personnel Updates' and 'Master Maintenance'. Under 'Master Maintenance', 'Personnel Master Maintenance' is selected and highlighted in blue. Other items under 'Master Maintenance' include 'District Site Master Maintenance' and 'Termination Codes Maintenance'. At the bottom of the window, there is a 'Keyword:' field with a dropdown arrow and an 'Enter' button. Below that, a status bar displays 'District: 100', 'FY: 2003', '02/12/200', and '9:37 AM'.

Illustration 1.2

1.3 The Job Categories screen will appear upon selection of the Personnel Master Maintenance menu item.

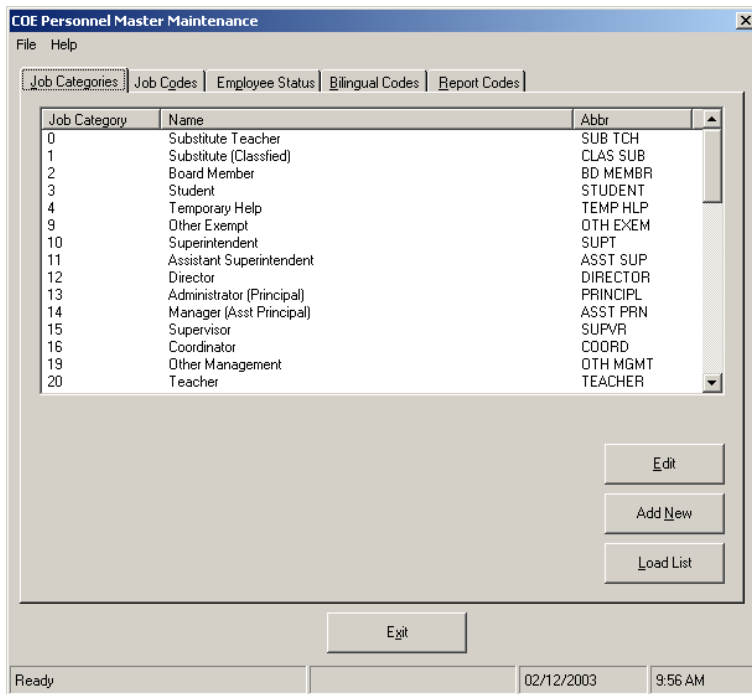


Illustration 1.3

CREATING AND EDITING JOB CATEGORIES

- 2.1 Categories may be added or edited from this screen. Job Categories classify employees by the nature of their assignment (i.e. teaching, administrative etc.)
- 2.2 Select a Job Category to work with; the Category should be highlighted with a dark bar across the entry. Left click the Edit button to enter the Category. You will see the Category information appear in the lower left hand corner of the screen where it is blank in Illustration 1.3
- 2.3 Change the Abbreviation or Name of the Category and click **Update**. If you choose not to save your changes, click **Cancel**.
- 2.4 To add a new category, click the **Add New** button. You will be given the opportunity to create a new Category Number, Abbreviation and Name. Click **Add** to save the new information.

CREATING AND EDITING JOB CODES

- 3.1 Codes may be added or edited from this screen. Job Codes also classify employees by the nature of their assignment (i.e. teaching, administrative etc.)
- 3.2 Select a Job Code to work with; the Code should be highlighted with a dark bar across the entry. Left click the Edit button to enter the Code. You will see the Code information appear in the lower left hand corner of the screen where it is blank in Illustration 1.3
- 3.3 Change the Abbreviation or Name of the Code and click **Update**. If you choose not to save your changes, click **Cancel**.

3.4 To add a new Code, click the **Add New** button. You will be given the opportunity to create a new Code Number, Abbreviation and Name. Click **Add** to save the new information.

Note: The remaining tabs on this screen are read-only and may not be changed as they apply County-wide.

CREATING OR EDITING PERSONNEL SITES

4.1 Select the *Personnel Sites* menu item from the *Personnel Master Maintenance* screen.

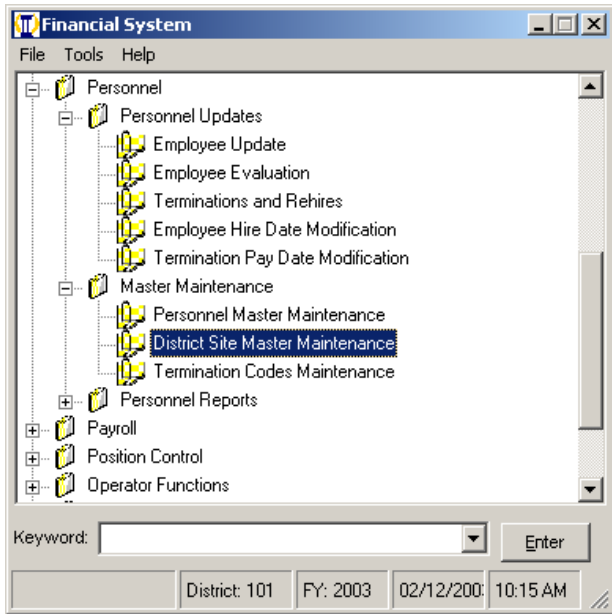


Illustration 4.1

4.2 The *Personnel Site Maintenance* screen will appear. (Note: The sites that were used on the HP system will be migrated to SACS. It is at this point that you may choose to update them.)

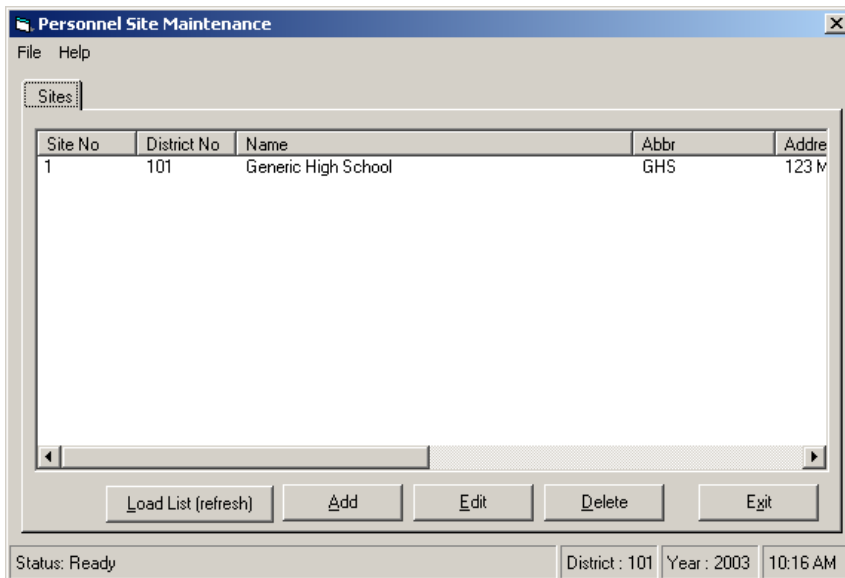
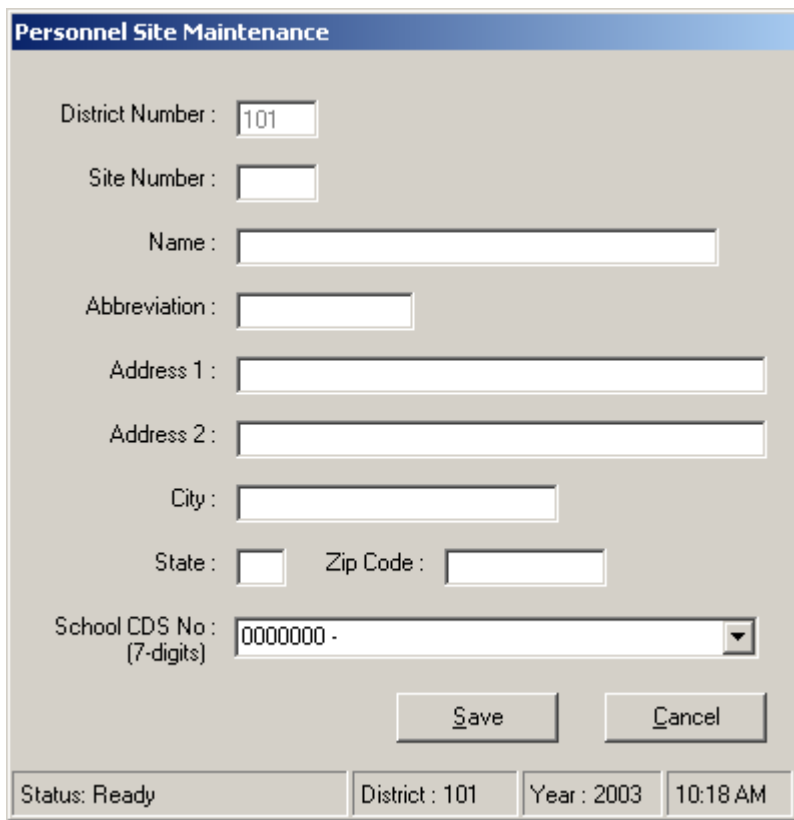


Illustration 4.2

4.3 Click the Add button to insert another Site into the table.



The image shows a 'Personnel Site Maintenance' dialog box with the following fields and controls:

- District Number:
- Site Number:
- Name:
- Abbreviation:
- Address 1:
- Address 2:
- City:
- State: Zip Code:
- School CDS No: (7-digits)
-
- Status: Ready | District: 101 | Year: 2003 | 10:18 AM

Illustration 4.3

4.4 Fill in the requested information and click the **Save** button. Use the **Cancel** button to exit without saving.

4.5 Editing is much the same. Select the record by single clicking it in the grid and then click the **Edit** button. You may make changes to the information contained in the fields and may save it by clicking the **Update** button.

4.6 To delete, select the record and click the **Delete** button. A message box will appear asking whether you wish to delete the site. Sites may only be deleted if no employees have been assigned to it.

ADDING AND EDITING TERMINATION CODES

5.1 Termination Codes are District specific and may be defined by the Personnel department to describe specific situations.

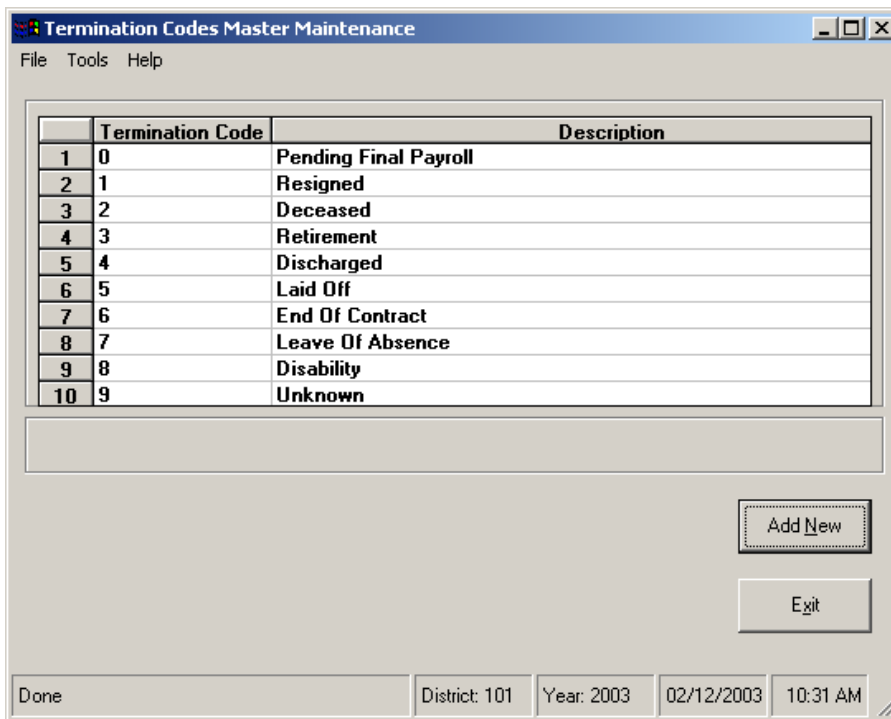


Illustration 5.1

5.2 Click the **Add New** button to enter a new Code. This will load a box in the bottom left hand corner of Illustration 5.1 with the following text areas: Termination Codes, Termination Reason, and Abbreviation. Fill these out and click **Add** to save.

5.3 Editing of the existing codes is performed by selecting the **Edit** button or double clicking on the record that you wish to affect. Changes may be made and subsequently saved through the **Update** button.

REPORTS OF THE MASTER LISTS

Note: Any of the master lists may be printed by selecting *Personnel Reports, Master List Reports*, choosing the report and selecting the menu item.

EMPLOYEE UPDATE

6.1 Select the *Employee Update* menu item from the *Personnel Updates* list.

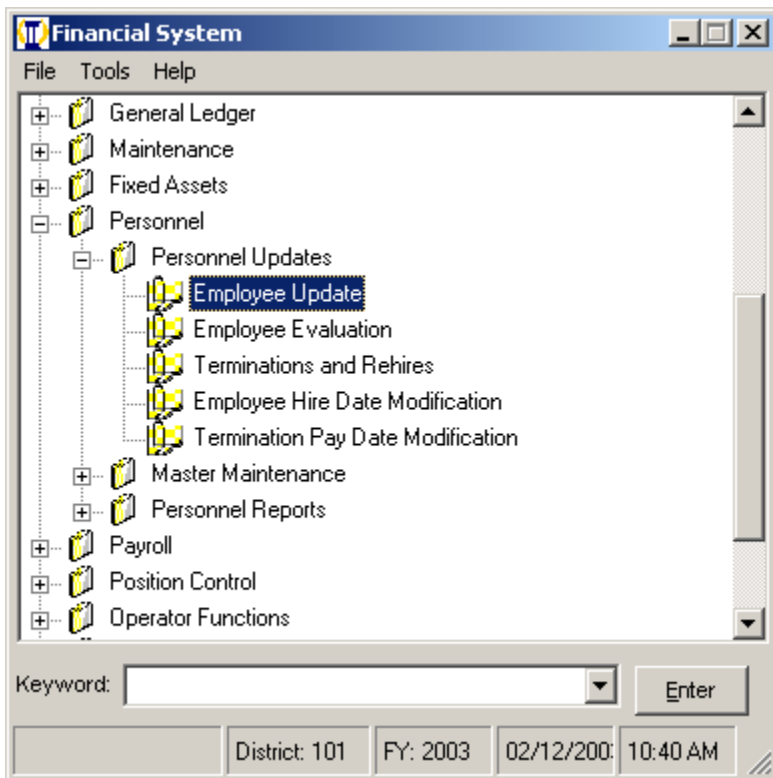


Illustration 6.1

6.2 The Personnel system is tied together with the Credentials system. Upon entry of the Employee's Social Security Number (SSN), the Employee's Indicative Data will be imported into the Personnel screen if they already exist in the Credentials system. This information may be overwritten in the Personnel screen if so desired (this will not affect the data in the Credentials system). A new entry to the system must be made by SSN; searching may be by SSN, last name, or if the box is checked, by former last name. Further filters may be applied to the search criteria by selecting Active, Terminated, or All.

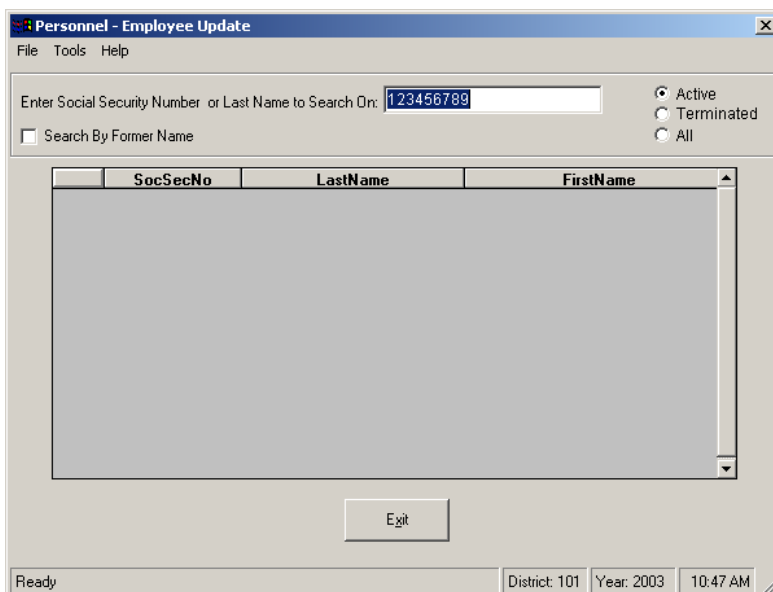


Illustration 6.2

6.3 Once an employee has been selected and the records have been found or in the case of a new employee, the **Employee Update** screen has been displayed, the user may make changes to the information.

The screenshot shows the 'Personnel - Employee Update' window with the 'Employee Indicative' tab selected. The form contains the following fields and options:

- SSN: 123-45-6789
- Last Name: DOE
- First Name: JANE
- Mid Init: P
- Street Address: 1258 ANY STREET
- City: ANYWHERE
- State: CA
- Zip: 99999-0000
- Phone: (559)555-5556
- Restrict Phone:
- Restrict Address:
- Work Phone: () - -
- Ext:
- Ethnicity:
- Bilingual:
- Status:
- Report Code:
- Marital Status:
 - Single
 - Married
- I-9 Status:
 - Non-Resident
- Sex:
 - Female
 - Male
- TB Type:
 - X-Ray
 - PPD
 - Exempt
- Birth Date: / /
- Seniority Date: / /
- Hire Date: / /
- Terminated Date: / /
- Rehire Date: / /
- TB Expire Date: / /

Buttons at the bottom: View Former Names, Add, Cancel, View Credentials.

Status bar: Status, SocSecNo: 123-45-6789, District: 101, Year: 2003, 10:46 AM

Illustration 6.3

The following information must be completed in order to move to the next tab or save the employee: Name, Address, Ethnicity, Bilingual, Status and Report Codes. Birth Date, Hire Date and TB Expire Date must also be completed before additional tabs may be accessed.

6.4 No information is necessary in the **Contact Information** tab, but may be used to keep emergency contact information on the employee.

6.5 Move to the **Contract/Salary** tab to enter their Job Codes and work locations.

The screenshot shows the 'Personnel - Employee Update' window with the 'Contract/Salary' tab selected. The form contains the following fields and options:

- Last Name: DOE
- First Name: JANE
- Middle Initial: P
- Contract Information:
 - Major Job Code:
 - Job Category:
 - Work Location1:
 - Work Location2:
 - Bargaining Unit:
- Calculated Salary Information:
 - Primary Full Time Equiv: 0
 - Primary Hours Per Day: 0
 - Primary Work Days Yrly: 0
 - Primary Hourly Rate: 0
 - Primary Daily Rate: 0
 - Annual Salary/Payroll: 0
 - Monthly Salary/Payroll: 0
 - Annual Salary/Assignment: 0
- Education:

	Units Above:	% or \$:	Amt:
BA Degree <input type="checkbox"/>	0	%	
MA Degree <input type="checkbox"/>	0	%	
PHD Degree <input type="checkbox"/>	0	%	

Buttons at the bottom: View Former Names, Add, Delete, Cancel, View Credentials.

Status bar: Status, SocSecNo: 123-45-6789, District: 101, Year: 2003, 11:05 AM

Illustration 6.5

- 6.6 Using the drop down menus, select the employee's *Job Code*, *Category*, *Work Location* and *Bargaining Unit*. Note: Bargaining Unit is District specific and must be set up by the County Office of Education Payroll department.
- 6.7 Under the **Additional Information** tab the first evaluation date must be assigned before the employee can be saved. Select an evaluation date and move back to the **Employee Indicative** tab.
- 6.8 Click the **Add** button on the Employee Indicative tab to save the employee.
- 6.9 Upon completion of the save function, the Job Assignment screen will appear. If the Employee Assignments screen does not appear, click the **Add New Assignments** button.

Illustration 6.9

Completion dates are only used to indicate a completed assignment and must be used only after the employee has finished the assignment; future dates are not allowed. The *Current Primary Assignment* box must be checked to indicate the primary assignment. The *Resource Number* (Program) must also be selected for the employee's assignment.

In order to use FTE reports, the *Hour/Day Work Information* section must be completed; this information is based on primary assignments, and so must be filled out for jobs that are designated through the use of the check box as primary assignments.

Note: If the District does not use the salary schedule information then the *Annual Salary* field must be completed. (Some fields will be automatically populated when the Salary Schedule feature is used.)

TERMINATIONS AND REHIRE

7.1 The time may come when an employee leaves or having left already, is rehired. The *Termination* and *Rehire* menu options allow the District to perform these functions.

Process Termination

File Help

Terminations ReHires

SSN: 123-45-6789 Last Name: DOE First Name: JANE Mid Init: P
Hire Date: 02/12/2003

Termination Date: Termination Code: Last Payroll Date:

Comments:

Generate Notice of Payroll Separation [Update] [Print Report] [View Report] [Cancel]

Ready SocSecNo: 123-45-6789 District: 101 Year: 2003 9:25 AM

Illustration 7.1

7.2 Enter the last day of employment for the individual in the *Termination Date* field.

7.3 Select a *Termination Code* from the drop down menu. These codes are District defined and are created in the Personnel Maintenance area. (See Section 5)

7.4 The *Last Payroll Date* field could be different than the Termination Date since the payroll period could extend past the date of separation. Personnel should determine in conjunction with the Payroll department the date that should be given as the Last Payroll Date to ensure that enough time is available to clear up any outstanding payroll balances.

Note: The employee's payroll information such as bank account (for direct deposit), payroll expense lines, any voluntary deductions they may have had are dropped after the employee's last payroll run as determined by the last payroll date. This makes it extremely important to coordinate the timing with the Payroll department.

7.5 Comments may be included in the *Comment* text box.

7.6 Click **Update** to save the information.

7.7 The Generate Notice of Payroll Separation check box will print a form that Personnel can give to the Payroll department for their records. This can be printed on NCR paper, one copy of which can then be filed in the employee's personnel folder.

7.10 Termination and Rehire date modification training is available upon request but will not be covered here.

EMPLOYEE EVALUATIONS

8.1 Enter the employee's SSN or Last name in the search criteria field.

Employee Evaluation - History/Schedule

File Tools Help

Search Criteria

SSN or Last Name:

Number of Records:

Active
 InActive
 All

Evaluation Records

	Dist	SSN	Last Name	First Name	MI	Hire Date	Term Date	Rehire Date
1	101	123456789	DOE	JANE	P	02/12/2003	02/13/2003	03/01/2003

Evaluation Reports

Evaluation Period (mm/dd/yyyy)

Ready District: 101 Year: 2003 10:12 AM

Illustration 8.1

8.2 If you choose to select the employee out of the grid, do not enter an SSN or last name; indicate how many records (employees) you want the search to display (by entering a numerical value in the *Number of Records* field) and click **Search** or hit enter. Partial name searches may also be performed simply by typing a portion or the beginning letter of an employee's last name and clicking **Search** or hitting the enter key. *Note: The numerical value in the Number of Records field determines how many employees are displayed in the grid.*

8.3 The Evaluation program is primarily used to schedule employee evaluations and notify the managers of those that are due within a specified time period as selected in the drop down menu on the Evaluation Reports text box.

8.4 You may Double-click the selected row or hit enter to view the detail screen.

Note: The evaluation section is only meant to provide a means to track and schedule employee evaluations and should not be used in lieu of the form itself.