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Human Resources

User Guide

OVERVIEW

Human Resources

Human Resources is an add-on module of the School Accounting System and integrated with the Payroll module. Human Resources is used to track personnel information, including benefit offerings/ enrollment, dependents, positions, education, certifications, employment history, evaluations, trainings, family and medical leave requests, workers' compensation reports/claims, and military service. Within Human Resources, a sick bank for leaves (defined in Payroll) can be set up and withdrawals and deposits made. Also, checklists can be created and used for employees to track a list of tasks to be completed for various processes (for example, New Hire Checklist). Human Resources can also be tied to the Negotiations module in order to place employees in the correct lanes based on their degree and additional credit hours (for example, BA + 6 additional credit hours) or position titles (for example, Head Football Coach). Numerous reports can be printed within the Human Resource module, such as detailed or summarized listings and history reports, and email messages can be sent to employees.

Available Help

<u>Help File</u>
The School Accounting System (including the Human Resources module) features a Help File that includes a table of contents, a topical index, a search option, and context-sensitive help. To open the Help File, select the **Help** menu from any screen and then select **School Accounting System Help**. To access the table of contents, click the **Contents** tab located in the upper left-hand corner of the screen; to use the topical index, click the **Index** tab; or to complete a search for specific information, click the **Search** tab.

The context-sensitive help provides help text related to a specific field in the data entry and maintenance screens of the School Accounting System and its add-on modules. To access the context-sensitive help, place the cursor on the desired field and then press the **F1** key (or right-click in a field and select **What's This?**).

To print a specific topic in the Help File, bring up the desired topic and then click the **Print** button located at the top of this screen.

<u>Web Page</u>
Access Software Unlimited, Inc.'s web site at **www.su-inc.com**, and to view the Knowledge Base containing Frequently Asked Questions (FAQs) and Training Tidbits, click the **Knowledge Base** link under the Help & Support section on any of the main screens in the School Accounting System.

<u>Customer Support Help Line</u>
The Customer Support Help Line is a toll-free number available to our customers from 8 a.m. to 5 p.m. Central Time, Monday through Friday. The annual maintenance fee for the software includes help line assistance for questions related to the School Accounting System and the add-on modules your organization has licensed. **To reach our Customer Support Help Line, call 800.756.0035, Ext. 2,** or utilize the Create a Support Request feature in the software. If calling, be ready to give the receptionist your Name, School District, Customer ID, and a brief message regarding the problem. After calling or creating a support request, one of our Certified Customer Support Representatives will call you back to assist with problem resolution.

Create a Support Request

The Create a Support Request feature allows a user to request assistance from Customer Support for help with a question or issue. Once a request has been submitted, a Customer Support Representative will contact you for assistance.

Creating a Support Request:

1. From the main School Accounting System screen or a module's main screen, click the **Request Support** icon (see **Diagram A**) in the lower right-hand corner of the screen, or click the **Create a Support Request** link under the Help & Support section.
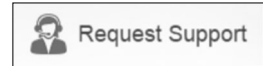
Diagram A

2. At the Create a Support Request screen, the customer ID number assigned to your organization by Software Unlimited, Inc. displays in the Customer Number field and <u>cannot</u> be changed.

3. In the Name field, enter the name of the user at your organization that should be contacted for assistance, or click the **down-arrow** button to select the correct one.

   Note: Only the users we have listed in our records for your organization are able to be entered into the Name field; if your name is not listed, click the **Cancel** button and contact Customer Support.

4. Enter your question or a description of the issue in the Comment/Question field. The question or description can be up to **8,000** characters long.

5. If desired, to attach a file to submit with the support request, enter the path (drive and folders) and file name of the file to attach in the Attach File field, or click the **Attach File** button to browse to and select the file.

   Note: Only one file can be attached, and the file size <u>cannot</u> be greater than 50MB.

6. Click the **Execute** button.

7. A prompt will appear stating the request has been submitted; click **OK**.

Program Suggestions

The Program Suggestions feature allows a user to submit a suggestion for a future change or enhancement to the School Accounting System or one of the add-on modules.

Submitting a Program Suggestion:

1. From the main School Accounting System screen or a module's main screen, click the **Program Suggestions** link under the Information section.

2. At the Program Suggestions screen (see **Diagram B**), the customer ID number assigned to your organization by Software Unlimited, Inc. displays in the Customer Number field and <u>cannot</u> be changed.

3. In the Name field, enter the name of the user at your organization that should be contacted for any additional information regarding the suggestion, or click the **down-arrow** button to select the correct one.

4. Enter a description of the suggestion and an explanation of the benefits for the enhancement in the applicable fields. The description and explanation can each be up to **8,000** characters long.

5. Complete the next three fields by clicking the **down-arrow** button and selecting the appropriate response.

6. If desired, to attach a file to submit with the program suggestion, enter the path (drive and folders) and file name of the file to attach in the Attach File field, or click the **Attach File** button to browse to and select the file.

   Note: Only one file can be attached, and the file size <u>cannot</u> be greater than 50MB.

7. Click the **Execute** button to submit the suggestion.

8. A prompt will appear stating the suggestion has been submitted; click **OK**.

Diagram B

Enter the information into the appropriate fields and then click the **Execute** button to submit a program suggestion.

Backups

The backup database function, which is accessed by clicking the **Backup** icon on the main screen of the School Accounting System or the Backup option listed under the Check Cycle menus in Accounts Payable and Payroll, makes an encrypted backup file of the database at a specific point in time. Since all the data in the School Accounting System resides in one database, the backup database function backs up all modules including Accounts Payable, General Ledger, Payroll, Fixed Asset Inventory, Human Resources, Negotiations, Report Writer, and Accounts Receivable.

When making a backup in the School Accounting System, the backup file of the database is created in the backup folder in the SQL Server instance and can be copied to a different location, such as to a flash drive or a location on the user's local hard drive, if desired. The backup files in the backup folder in the SQL Server instance are retained based on the values entered in the Number of Days to Keep Backups field and the Minimum Number of Backups to Keep field in the System File, while the additional backup copies can be stored for longer periods of time as desired.

Tips:
- Be sure to make a backup prior to updating files in the School Accounting System (for example, make a backup prior to updating a check cycle).
- **For organizations using the School Accounting System-Online version,** a nightly backup is automatically made and the nightly backups are retained for three weeks. If needed, the previous night's backup file is readily available to be restored by contacting Customer Support for assistance to access it; if a nightly backup other than the prior night's backup is needed, there may be a fee to access it (as that nightly backup file is stored offsite).
- **For organizations with the School Accounting System installed locally,** be sure to make regular backups of your database in the School Accounting System (such as a weekly or a daily backup), in addition to making backups prior to updating files; and develop a schedule for all users for when to make backups and establish a procedure for storing the backups in a safe place away from the office in case of a fire or other natural disaster.

Note: For organizations with the School Accounting System installed locally, the School Accounting System can be set up to complete daily backups of the database, if desired. To set up the system to make a daily backup, complete the fields on the Backup Options screen in the System File (refer to Steps 1, 4, and 5 of the Completing the System File topic in the Help File). When making a daily backup, the backup file is only created in the backup folder in the SQL Server instance (an external copy is <u>not</u> made).

<u>Backing Up</u>:
Note: The steps below are for completing the backup database function at a specific point in time in the School Accounting System.

1. From the School Accounting System screen, click the **Backup** icon.

   Note: The Backup option can also be accessed by selecting the **Check Cycle** menu and then **Backup** from the Accounts Payable or Payroll screen if backing up prior to updating a batch of checks for Accounts Payable or Payroll. If making a backup as part of completing the Change Account Structure, Crosswalk Account Numbers, Purge Data, or Upload Database to SUI option, or installing an update, skip this step.

2. At the Backup Database screen (see **Diagram A**), enter a description to explain the reason for making the backup in the Comment field. The description can be up to **1,000** characters long. For example, if making a backup prior to updating a batch of checks in Accounts Payable, enter **Accounts Payable Checks Backup October YYYY** in the Comment field. If applicable (such as when making a backup as part of completing an option or installing an update), leave this field <u>blank</u> to use a default description assigned by the system.

3. Select the Make an Additional Copy field to copy the backup from the backup folder (on the SQL Server instance) to a different location, such as to a flash drive or a location on the user's local hard drive, in order to retain the backup for a longer period of time (than what is stipulated on the Backup Options screen in the System File) or store the backup away from the office. A checkmark will appear in the box if the field is selected.

4. If the Make an Additional Copy field is selected, the Path for Additional Copy field will be enabled. Enter the destination location for where to make the additional backup copy in the Path for Additional Copy field, or click the **Directory** button to browse to the desired path and then click the

OK button. The path last specified when an additional backup was made on your computer appears as the default, but can be changed.

5. Click the **Execute** button to backup the database.

    Tip: The name of the backup file will include the date and time the backup was made, using the following format: **XX_####_OrganizationName_yyyy-mm-dd_hhmmss**, with **XX** being the appropriate state abbreviation and **####** being the customer ID number for the organization. The backup file created in the backup folder will have a file extension of **.bak**, while the additional backup file copied to the specified location (if applicable) will have a file extension of **.gz**.

6. Once the backup file (**.bak** file) has been created, the Backup Database screen will close. If an additional copy was selected to be made, the system will start creating the additional backup file (**.gz** file) after the screen closes and will continue working in the background. (*Tip:* If the additional backup file is being made on a removable drive (i.e. a flash drive), keep the removable drive connected until the additional copy has been completed.)

    Note: The Backup Database screen will remain open until the additional copy (if applicable) was created if making a backup while installing an update to the School Accounting System or completing the Upload Database to SUI Support option.
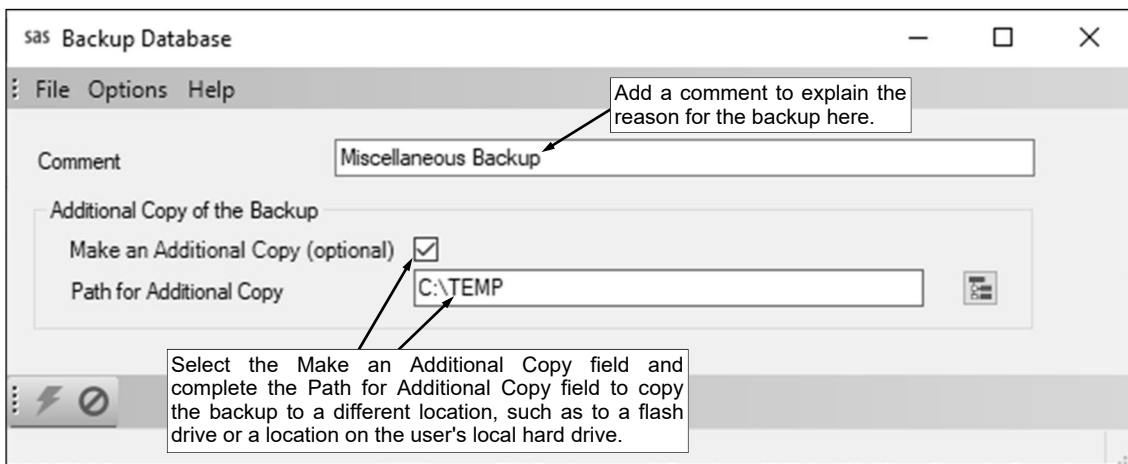
Diagram A

Printing Reports

<u>Printing a Report</u>:

1. From the applicable screen, select the **Reports** menu. See **Diagram A**.

    Tips:

    1) If accessing the **Reports** menu from the main screen for a module, select **Report Writer - Standard** if the report to print is a standard report; select **Report Writer - Custom** if the report to print is a custom report; select the Report Search option to search for a particular report within that module; select the appropriate group (for example, Employee Reports, Vendor Reports, etc.) as a short-cut to only view reports pertaining to a particular file or item; or select the "favorites" group for your user to view only the reports designated as a favorite for your User ID. (**Note:** The Report Writer - Custom option is only available if custom reports have been built for the particular module.)

    2) If printing a report *prior to* printing checks during an Accounts Payable or Payroll check cycle, select the **Check Cycle** menu and then **Pre-Check Reports**, or if printing a report *after* printing checks during a check cycle, select the **Check Cycle** menu and then **Post-Check Reports**.

    3) Within the various option or groups of reports, the custom reports are listed with an icon of a blue pencil.

2. Select the desired report.

3. If printing mailing labels, when prompted, select the label setup for which to use by double-clicking on the desired format.

4. Complete the required report printing options, if applicable. See **Diagram B**.

    Tip: If the report printing options for the particular report have been previously saved by clicking the **Save Settings** button, click the **Retrieve Settings** button at this time to display the saved settings.

    a. If applicable, specify the desired type of the report to print in the Report Selection Description field. For example, when printing the Balance Sheet in General Ledger, select either **Monthly** or **Annual**, depending on which type of balance sheet to print. The default report selection will appear in the Report Selection Description field but can be changed by clicking the **down-arrow** button and selecting the correct one.

From the **Reports** menu, select the appropriate grouping, and then the desired report to run.

Diagram A

    b. If applicable, specify the variable values for each field listed in the Variable Fields section to determine what information to print on the report. When entering the value for a date, month, or year variable field, use the format of **mm/dd/yyyy** for a date, **mm/yyyy** for a month, or **yyyy** for a year, or click the **down-arrow** button to select the desired date, month, or year.

    c. If applicable, specify the ranges or select only certain records for each field listed in the Report Parameter section to determine what information to print on the report. To select the desired records to include on the report for the parameter fields, complete one of the following:

    • Click the **Search** button to select specific records. When using the **Search** button, only the records applicable for the other specified selections will appear (for example, if a particular pay group has been specified on a Payroll report, only the employees in the particular pay group will appear when clicking the **Search** button for the Employee ID parameter).
   **Note:** If the **Search** button is used to select specific records, the number of records selected will appear to the right of the button (or if the description of the selected records will fit in the space allotted for the display, the description of those selected records will display instead).

    • Enter the desired starting record to include on the report in the From field and the ending record to include in the To field. If the parameter field is for a date or month, use the format of **mm/dd/yyyy** when entering a date or **mm/yyyy** for a month, or click the **down-arrow** button to select the desired date or month.

    • Enter the records to include on the report using the wildcard characters (**%** or **_**) as placeholders in your variable search information for the parameters in the From field. Use the percent sign (**%**) as a placeholder for an unlimited number of characters and the underscore (**_**) as a placeholder for one character. For example, enter **G%** in the From
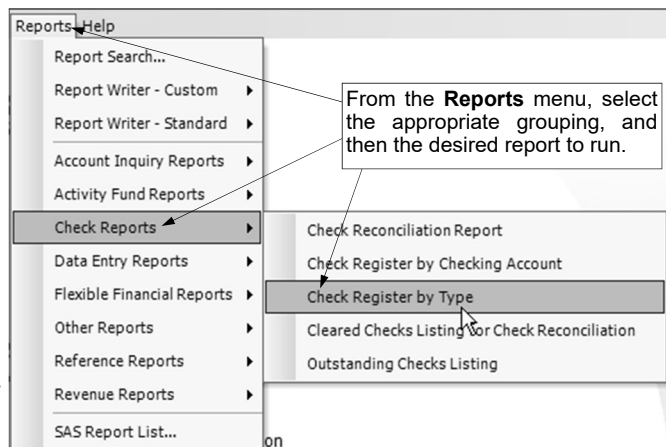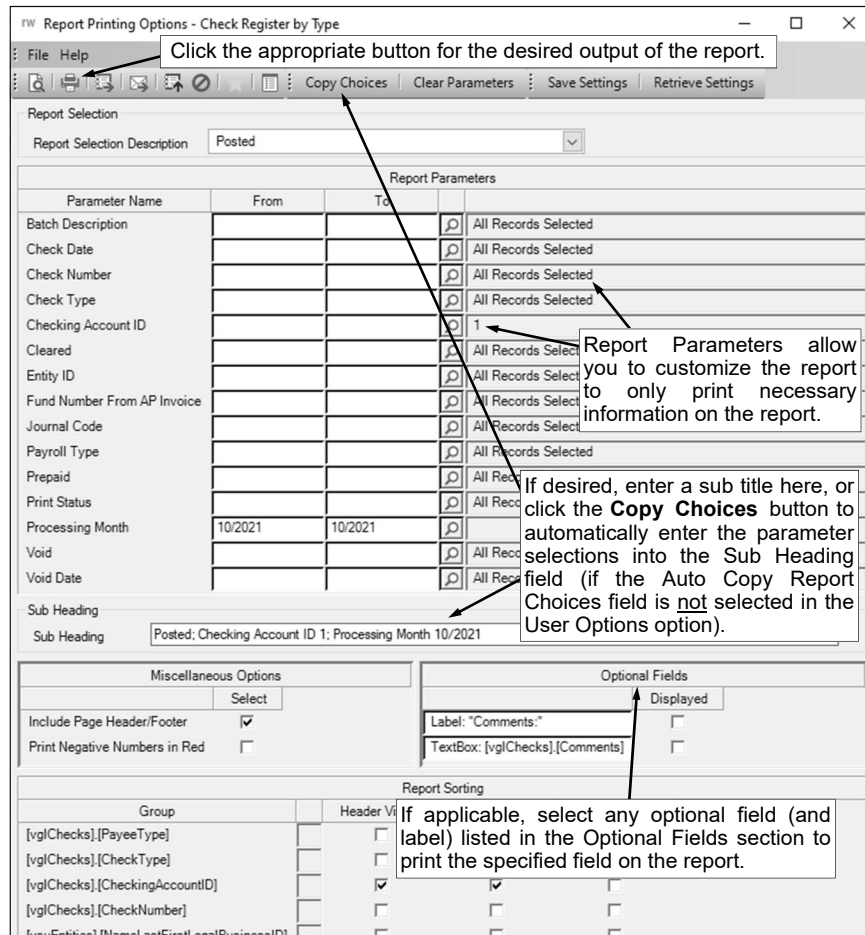
Diagram B

field for a Vendor ID parameter to print all vendors defined with an ID starting with the letter G. **When entering a mask for account numbers using the wildcard characters, be sure to key spaces between the account dimensions.**

- Enter the particular range of records to include using a "z". To print a range, enter the beginning information of the first records to print in the range in the From field for the desired parameter; then in the To field for that parameter, enter the beginning information of the last records to print in the range followed by a "z" at the end of the string. For example, to print all vendors defined with an ID starting with letters A through H, enter **A** in the From field for a Vendor ID parameter and enter **Hz** in the To field. **When entering a range for account numbers using a "z", be sure to key spaces between the account dimensions.**

Tip: If there are parameters selected by default (for example, a batch is selected by default), click the **Clear Parameters** button, if desired, to clear the defaults so that all records are selected for each item.

d. If desired, enter a description to use as a sub title for the report in the Sub Heading field. The sub heading can be up to **255** characters long. If the Auto Copy Report Choices field is selected within the User Options option, a default sub heading will appear but can be changed.

Tip: Click the **Copy Choices** button to automatically copy the selections made to the report, such as the specified Report Selection Description and selected parameters, into the Sub Heading field (only applicable if the Auto Copy Report Choices field is not selected within the User Options option).

e. If applicable, complete the Miscellaneous Options section with the desired options.

- The Include Page Header/Footer field appears if the report contains the Page Header and Page Footer sections. If applicable, select the Include Page Header/Footer field (by clicking the box under the Select column located to the right of the field) to print the information included in the Page Header and Page Footer sections on the report. A checkmark will appear in the box if the field is selected. This field is selected by default.

Tip: Typically, this field is only unselected if the report will be exported to a format in which the page header and page footer sections should be omitted, such as when exporting to a Microsoft® Excel spreadsheet file.

- The Mask Federal ID field appears if the report contains the Federal ID field for employees or vendors. If applicable, select the Mask Federal ID field (by clicking the box under the Select column located to the right of the field) to print only the last 4 digits of the federal IDs on the report. If this field is selected, the first digits of the federal IDs will be masked (for example, XXX-XX-4321 or XX-XXX1234). A checkmark will appear in the box if the field is selected. This field is selected by default.

  Note: This field will be disabled if the user does <u>not</u> have the Print Federal ID field selected within the User Security option.

- The Mask Bank Account Number field appears if the report contains a bank account number field. If applicable, select the Mask Bank Account Number field (by clicking the box under the Select column located to the right of the field) to print only the last 4 digits of the bank account numbers on the report. If this field is selected, the first digits of the bank account numbers will be masked (for example, XXXXXX4321). A checkmark will appear in the box if the field is selected. This field is selected by default.

- The Print Negative Numbers in Red field appears if the report contains numeric fields. If applicable, select the Print Negative Numbers in Red field (by clicking the box under the Select column located to the right of the field) to have the numeric values that are negative on the report appear in red on the preview screen and print in red (provided a color printer is utilized). A checkmark will appear in the box if the field is selected. This field will be selected by default if the Print Negative Numbers in Red field is selected within the User Options option for the specified user.

f. If applicable, select the Displayed field for any optional field and the corresponding label field listed in the Optional Fields section to print the specified field on the report. A checkmark will appear in the box if the Displayed field is selected and the optional field will print on the report.

g. Only the following items can be changed for the Report Sorting section; otherwise, if other changes are made, the report will <u>not</u> print correctly.

- If the [vprEmployeePersonnelReference].[NoCustomReferencedID] field appears as a Report Sorting field, click the **Search** button to select the desired referenced custom field on which to sort the information included on the report.

- If applicable, for each Report Sorting field listed, select the New Page After field to insert a page break after the specified item. For example, if printing the Deduction Register by Deduction report, select the New Page After field for the [vprDeductionsAndTaxes].[DeductionID] report sorting field to have each deduction print on a separate page.

  Note: If the selected report was built with a defined page break for a particular item, the New Page After field will be selected by default for that item, but can be changed. Each time the report is printed, only the default page breaks will be selected.

- Only when printing the applicable reports, such as the Employee Detail Listing for Payroll or the Vendor Listing - Detail, select the Footer Visible field to remove the checkmark for any section to omit (<u>not</u> print).

5. If desired, click the **Save Settings** button at this time to save the specified report printing options in order to run the report with these exact settings in the future by utilizing the **Retrieve Settings** button. If you do <u>not</u> click the **Save Settings** button at this time, the settings must be re-entered the next time the report is generated.

Tip: A report can also be set as a favorite report (for the user) at this time by clicking the **Favorite Reports** button, or the report can be added to the user's report list accessed under the Reports menu on a module's main screen by clicking the **Report List** button.

6. Click the appropriate button for the desired output:
   a. To preview the report on the screen, click the **To Screen** button.
   b. To print the report directly to the printer, click the **To Printer** button.
   c. To export the report to a file, click the **Export** button and then complete the Export Options as desired.
   d. To email the report, click the **Email** button. Refer to the Emailing a Report topic for requirements to email a report.
   e. For organizations with the K12Docs module licensed and users with the applicable rights, click the **Upload to K12Docs** button to upload the report to K12Docs.

7. After the report is printed, click the **X** in the upper right-hand corner to close the reporting printing options screen, if applicable.

Set Screen Preferences

The Set Screen Preferences option allows a user to define settings for a specific screen, in order to have the fields (or tabs) on the screen display or function a certain way. The Set Screen Preferences are saved by user (except for the settings with custom fields, which are saved and applied to all users system wide). Depending on where the Set Screen Preferences option is accessed, the following functions may be available when setting the screen preferences: changing the order of the fields, columns, or screens; hiding particular fields, columns, or screens; and/or defining which fields to repeat information automatically from the previous entry without requiring an additional keystroke by the user. There are also a few additional miscellaneous features available within the Set Screen Preferences option for particular screens.

The Set Screen Preferences option is only available for certain screens within the School Accounting System. In the Human Resources module, the options where the Set Screen Preferences option can be accessed, along with the functions available for the option, are listed below.

Option	**Set Screen Preference Functions**
Custom Fields	Change order
Employees	Change screen order, hide screens

Note: If changes are made to the screen preferences, the default preference settings can be restored if desired. The option to restore the default settings is not available for custom fields.

Setting Screen Preferences for Custom Fields:
Note: The following instructions are for changing the screen preferences for custom fields. If the order of a custom field is changed, the changes will be reflected for all records in the particular file for all users.

1. From the Human Resources screen, select the **Maintenance** menu and then **Custom Fields**.
2. At the Custom Fields screen, select the tab for the type of custom fields for which to set the screen preferences, if applicable.
3. Select the **Options** menu and then **Set Screen Preferences**.
4. To change the order of the custom fields, click once on the field to move and then click the **Top**, **Up**, **Down**, or **Bottom** button until the field is in the desired position. See **Diagram A**.
5. After setting the desired screen preferences, click the **Save** button.
6. The Set Screen Preferences screen will close and the new settings will take effect the next time the applicable screen(s) is refreshed.
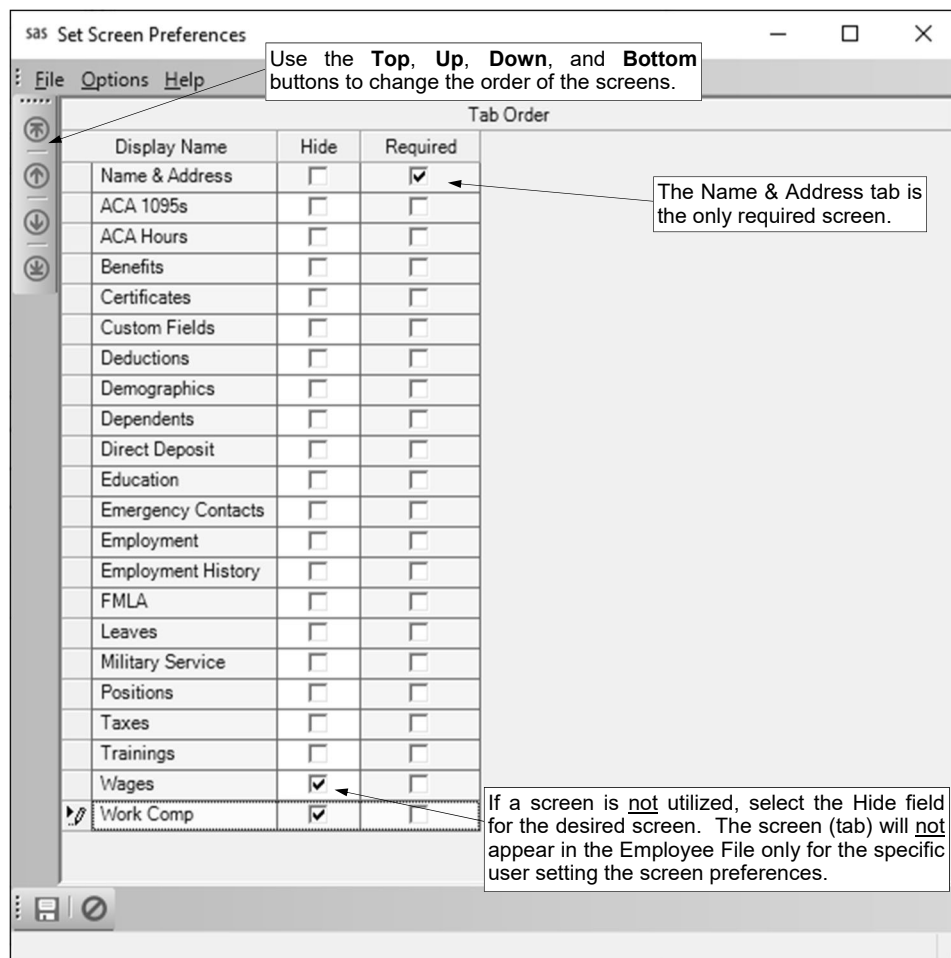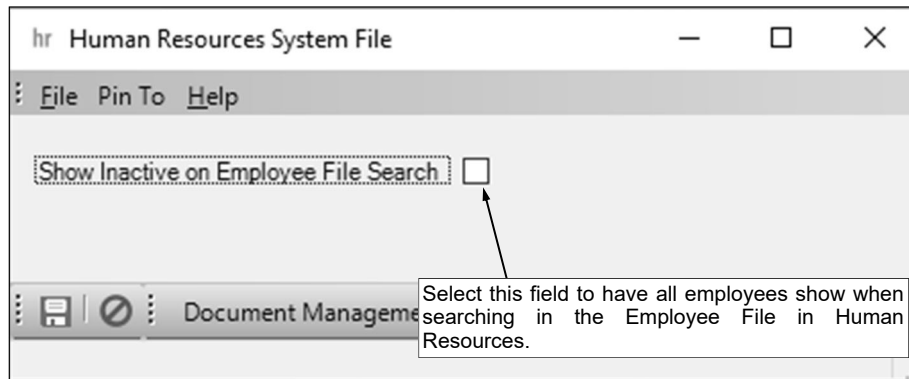
Setting Screen Preferences for Employee File:
Note: The following instructions are for changing the screen preferences in the Employee File.

1. From the Human Resources screen, select the **Maintenance** menu and then **Employees**.
   Note: If desired, to access the Employee File from Negotiations (if applicable), select the **Payroll** menu from the Negotiations screen and then **Employees**.
2. At the Employees screen, select the **Options** menu and then **Set Screen Preferences**.
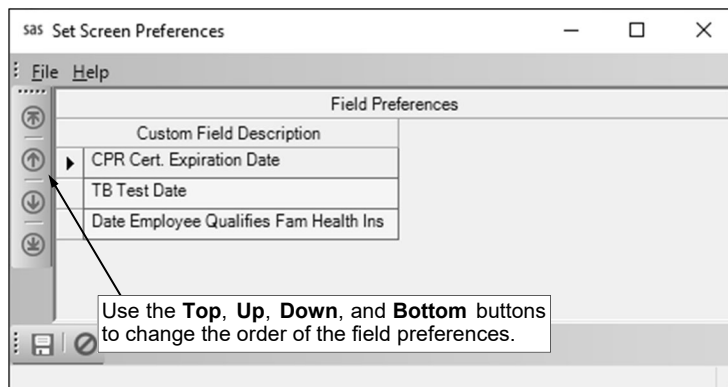
Diagram A

3. The Set Screen Preferences screen will appear listing each of the screens (tabs) included in the Employee File. See **Diagram B**.

    Note: If a user does not have rights to a particular screen in the Employee File (as set in the User Security option), the screen will not appear in the Tab Order List.

4. To change the order of the screens (tabs), highlight the screen to move and then click the **Top**, **Up**, **Down**, or **Bottom** button until the screen is in the desired position.

    Note: The Name and Address screen (tab) must always be the first screen and cannot be moved.

5. To make a screen (tab) not appear in the Employee File, select the Hide field for the desired screen. A checkmark will appear in the box if the field is selected.

    Note: If a screen is marked as Required, the Hide field cannot be selected as the screen must appear.

6. After setting the desired screen preferences, click the **Save** button.

7. The Set Screen Preferences screen will close and the new settings will take effect immediately.

Display Name	Hide	Required
Name & Address	☐	☑
ACA 1095s	☐	☐
ACA Hours	☐	☐
Benefits	☐	☐
Certificates	☐	☐
Custom Fields	☐	☐
Deductions	☐	☐
Demographics	☐	☐
Dependents	☐	☐
Direct Deposit	☐	☐
Education	☐	☐
Emergency Contacts	☐	☐
Employment	☐	☐
Employment History	☐	☐
FMLA	☐	☐
Leaves	☐	☐
Military Service	☐	☐
Positions	☐	☐
Taxes	☐	☐
Trainings	☐	☐
Wages	☑	☐
Work Comp	☑	☐

Use the **Top**, **Up**, **Down**, and **Bottom** buttons to change the order of the screens.

The Name & Address tab is the only required screen.

If a screen is not utilized, select the Hide field for the desired screen. The screen (tab) will not appear in the Employee File only for the specific user setting the screen preferences.

Diagram B

Human Resources System File

The Human Resources System File includes customized information pertaining to the Human Resources module for your organization.

Completing the Human Resources System File:
1. From the Human Resources screen, select the **Maintenance** menu and then **Human Resources System File**.
2. Select the Show Inactive on Employee File Search field to have the system show all employees when searching in the Employee File in Human Resources (by clicking the **Find** button), including those employees that are inactive. If this field is <u>not</u> selected, only active employees will appear when searching in the Employee File in Human Resources, but the filters can be changed to show all employees. A checkmark will appear in the box if the field is selected.
3. Click the **Save** button.

Diagram A

MAINTENANCE

Benefit Types

Benefit Types are used in Human Resources to group benefits into categories for sorting and reporting purposes. Examples of benefit types include Annuities, Dental Insurance, Disability Insurance, Life Insurance, Medical Insurance, State Retirement, Vision Insurance, and Other. Benefit types must be defined prior to adding benefits.

Adding a Benefit Type:
1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefit Types**.
2. At the Benefit Types screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the benefit type in the Benefit Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. Select the Active field to stipulate the benefit type is currently being used at the school district. A checkmark will appear in the box if the field is selected. When adding a new benefit type, the Active field is selected by default.
5. Enter a description for the benefit type in the Benefit Type Description field. The description can be up to **40** characters long.
6. Click the **Save** button.
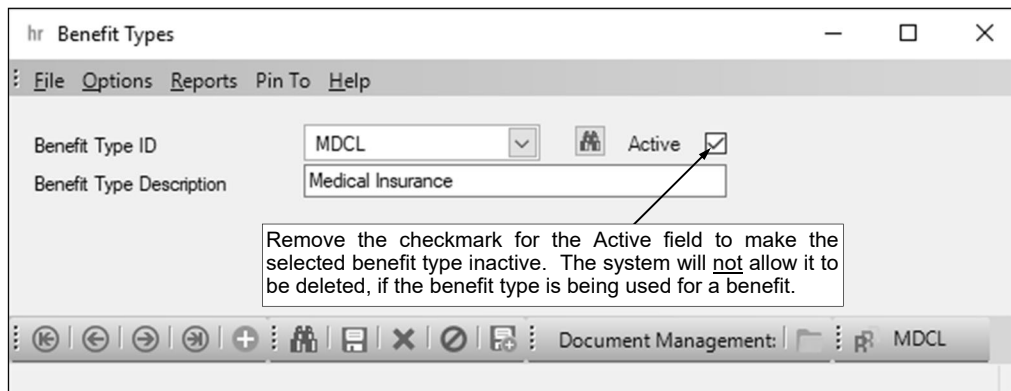
Diagram A

Changing a Benefit Type:
1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefit Types**.
2. At the Benefit Types screen, enter the ID of the benefit type to change in the Benefit Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes to the benefit type.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the benefit type was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the benefit type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new benefit type with the specified ID that is a duplicate of the current benefit type, click the **Create New** button.

Deleting a Benefit Type:
Note: If a benefit type is being used for a benefit, the system will <u>not</u> allow it to be deleted; however, a benefit type can be made inactive by removing the checkmark for the Active field within the Benefit Type File.
1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefit Types**.

2. At the Benefit Types screen, enter the ID of the benefit type to delete in the Benefit Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the benefit type to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Benefits

Benefits are used in Human Resources to define the various benefits offered by the school district for the employees, such as health insurance, life insurance, and retirement, including those items that may be paid entirely by the employees, such as annuities, supplemental insurance, and United Way donations. If desired, the different options (or levels) for which the benefit is offered can be stipulated within Benefits (for example, Option 1 is a no-deductible health insurance plan and Option 2 is a $250-deductible health insurance plan; or Option 1 is a single premium and Option 2 is a married premium; etc.), and the standard rates for each option can be specified if applicable.

Benefits are first defined in the Benefit File and then tied to the appropriate employees on the Benefits screen in the Employee File. Override rates can be specified for the benefit within the Employee File for an employee if standard rates were <u>not</u> entered in the Benefit File or the standard rates do <u>not</u> apply to the particular employee. Also, if an employee has dependents, the benefits for which the dependent is enrolled can be selected on the Dependents screen in the Employee File. Reports can then be generated for the benefits, including benefit participation and informational reports.

<u>**Adding a Benefit:**</u>
Note: Benefit types must be defined *prior* to adding benefits.
1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefits**.
2. At the Benefits screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the benefit in the Benefit ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

    Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. Select the Active field to stipulate the benefit is currently being used at the school district. A checkmark will appear in the box if the field is selected. When adding a new benefit, the Active field is selected by default.
5. Enter a description for the benefit in the Benefit Description field. The description can be up to **40** characters long.

Diagram A

6. Enter the ID of the benefit type for which the benefit is included in the Benefit Type ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

7. If applicable, enter the maximum age (up to **2** digits) a dependent of the employee can be and still be covered by the benefit in the Dependent Age Limit field.

8. If applicable, enter the maximum age (up to **2** digits) a dependent of the employee who is a full-time student can be and still be covered by the benefit in the Student Age Limit field.

9. If desired, enter any additional information to track for the benefit in the Comments field. The comment can be up to **1,000** characters long.

10. If needed, complete the Benefit Levels section to define the different options (levels) for which the benefit is offered and the standard rates for each, if applicable. To add a benefit level, complete the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Benefit Levels List, enter the correct type (**Annually**, **Monthly**, **Semi-Monthly**, **Bi-Weekly**, or **Percentage**) indicating how the rates for the particular option (level) are based in the Benefit Level Type field, or click the **down-arrow** button to select the correct one.

    b. Enter the description for the option (level) in the Benefit Level Description field (for example, Single Rate, Married Rate, etc.). The description can be alphanumeric and up to **40** characters long.

    c. If applicable, enter the amount of the standard rate paid by the employee for the option (level) in the Employee Benefit Level Rate field and the amount of the standard rate paid by the employer in the Employer Benefit Level Rate field. The system will automatically calculate the total of the two amounts and display the total in the Benefit Level Rate Total field; the amount displayed in the Benefit Level Rate Total field cannot be edited. The amounts can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

        Note: Leave the Employee Benefit Level Rate and Employer Benefit Level Rate fields blank if there are not standard rates applicable to a number of employees for the benefit level (in which case, the individual rates can be specified on the Benefits screen in the Employee File for each employee).

    d. If the rates for the benefit levels will change on a certain date, the new rates can be entered at this time by entering the date the new rates are effective in the Rate Change Date field (using the **mm/dd/yyyy** format or clicking the **down-arrow** button to select the desired date), and then entering the new amounts in the New Employee Benefit Level Rate field and the New Employer Benefit Level Rate field. The system will automatically calculate the total of the two amounts and display it in the New Benefit Level Rate Total field; the amount displayed in the New Benefit Level Rate Total field cannot be edited

    e. If applicable, repeat these steps until all the benefit levels have been added for the specified benefit.

11. Click the **Save** button.

Changing a Benefit:

1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefits**.

2. At the Benefits screen, enter the ID of the benefit to change in the Benefit ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes to the benefit.

    a. To add a new benefit level to the benefit, complete the blank line (indicated with an asterisk) at the bottom of the Benefit Levels List.

    b. To remove a benefit level from the benefit, click the **Delete** button located to the left of the desired benefit level in the Benefit Levels List; when prompted to delete the record, click **Yes**.

        Note: If a benefit level is being used on the Benefits screen of the Employee File, the system will not allow it to be deleted.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the benefit was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the benefit, click the **Change** button. To not change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new benefit with the specified ID that is a duplicate of the current benefit, click the **Create New** button.

<u>Deleting a Benefit</u>:
<u>Note</u>: If a benefit is being used in the Employee File, the system will <u>not</u> allow it to be deleted; however, the benefit can be made inactive by removing the checkmark for the Active field within the Benefit File. To delete just one benefit level from a particular benefit, follow the instructions for changing a benefit.

1. From the Human Resources screen, select the **Maintenance** menu, **Benefits**, and then **Benefits**.

2. At the Benefits screen, enter the ID of the benefit to delete in the Benefit ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the benefit to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.
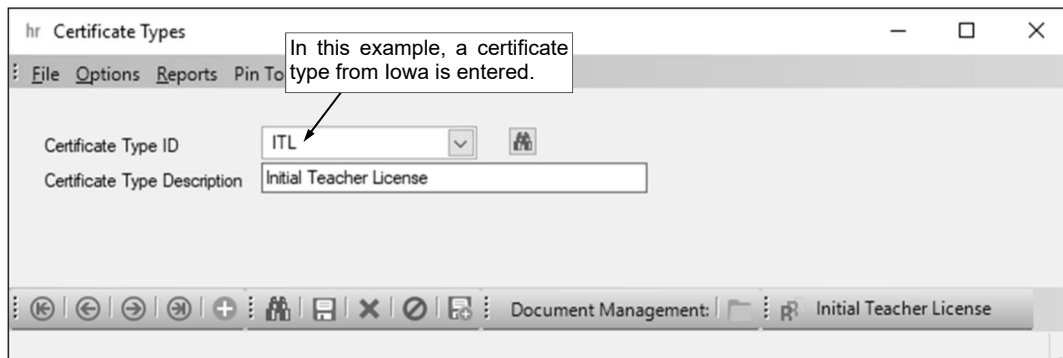
Certificate Types

Certificate Types is an option available in Human Resources to define the different categories or kinds of certificates that an employee can hold for educational certification/licensure, such as a Teaching Certificate, Educator License, or Administrative Certificate. A few examples of certificate types for the various states are shown below.

State:	Certificate Types:
Idaho	Administrator Certificate, Standard Instructional Certificate, Pupil Service Staff Certificate
Illinois	Standard Secondary Teaching Certificate, Initial Elementary Teaching Certificate, Superintendent Administrative Certificate
Iowa	Initial Teacher License, Class B Teacher License, Administrator License
Kansas	Professional Teaching License, Accomplished Teaching License, Conditional Teaching License, Professional School Leadership License
Missouri	Early Childhood Teaching Certificate, Elementary Education Teaching Certificate, Superintendent Administration Certificate
Nebraska	Regular Teaching Certificate, Temporary Teaching Certificate, Provisional Teaching Certificate, Regular Administrative Certificate
North Dakota	Educator's Professional License
South Dakota	Teacher Certificate-1 year, Teacher Certificate-5 year, Teacher Certificate-10 year
Wyoming	Standard Classroom Teacher License, District Superintendent School Administrator License, School Counselor Professional Services License

Certificate Types must first be defined before entering a certificate for an employee on the Certifications screen in the Employee File.

Adding a Certificate Type:

1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Certificate Types**.
2. At the Certificate Types screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the certificate type in the Certificate Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID using the first 10 characters (letters and numbers only) of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. Enter a description for the certificate type in the Certificate Type Description field. The description can be up to **40** characters long.
5. Click the **Save** button.

Diagram A

<u>Changing a Certificate Type</u>:

1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Certificate Types**.

2. At the Certificate Types screen, enter the ID of the certificate type to change in the Certificate Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes to the certificate type.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the certificate type was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the certificate type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new certificate type with the specified ID that is a duplicate of the current certificate type, click the **Create New** button.

<u>Deleting a Certificate Type</u>:
<u>Note</u>: If a certificate type is tied to a certificate entered on the Certificates screen in the Employee File, the system will <u>not</u> allow it to be deleted.

1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Certificate Types**.

2. At the Certificate Types screen, enter the ID of the certificate type to delete in the Certificate Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the certificate type to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Grade Levels

Grade Levels is an option available in Human Resources to define the various combinations of grades for which the certificates and/or endorsements are applicable for an employee. Examples of grade levels include K-12, K-6, 7-12, K-3, PreK-3, Elementary, Secondary, Upper Elementary/Junior High, High School, etc.

Once Grade Levels are defined, the appropriate grade combination is selected for each endorsement (if applicable) in the Endorsements File and/or entered for the certificate when completing the Certifications screen in the Employee File (only applicable for Illinois certificates, Missouri certificate types, and North Dakota certificates).

Adding a Grade Level:
1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Grade Levels**.
2. At the Grade Levels screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the grade level in the Grade Level ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

    Note: To have the system automatically assign the ID using the first 10 characters (letters and numbers only) of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. Enter a description for the grade level in the Grade Level Description field. The description can be up to **40** characters long.
5. Click the **Save** button.
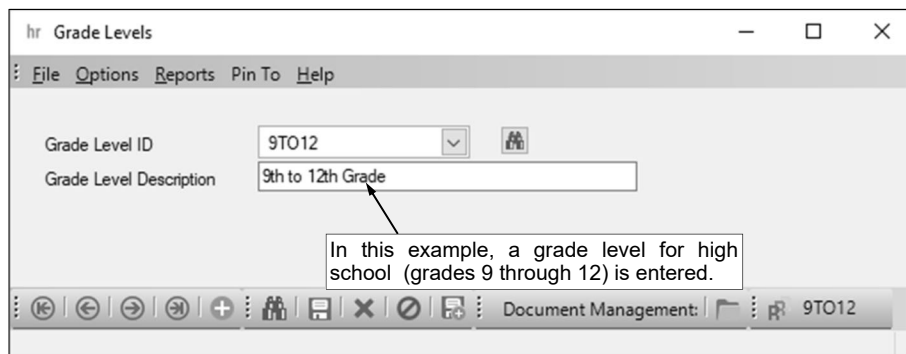
Diagram A

Changing a Grade Level:
1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Grade Levels**.
2. At the Grade Levels screen, enter the ID of the grade level to change in the Grade Level ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes to the grade level.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the grade level was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the grade level, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new grade level with the specified ID that is a duplicate of the current grade level, click the **Create New** button.

Deleting a Grade Level:
Note: If a grade level is tied to an endorsement or a certificate entered on the Certificates screen in the Employee File, the system will <u>not</u> allow it to be deleted.
1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Grade Levels**.

2. At the Grade Levels screen, enter the ID of the grade level to delete in the Grade Level ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the grade level to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Endorsements

Endorsements is an option available in Human Resources to define the different endorsement areas, subjects, specializations, or assignments that an employee has been approved to instruct or work as stated on the certificate or license. Endorsements can also be used to track other areas of additional information as stipulated on the certificate, such as the Completed State Approved Programs (for Illinois certificates only), Deficiencies (for Nebraska certificates only), Professional Preparation (for South Dakota certificates only), Majors (for South Dakota certificates only), and HOUSSE Highly Qualified Areas (for Wyoming certificates only).

A few examples of endorsements for the various states are shown below.

State:	Endorsements:
Idaho	**7083** Blended Early Childhood Education/Early Childhood Special Education, **7014** Blended Elementary Education/Elementary Special Education, **7010** All Subjects, **7050** Superintendent, etc.
Illinois	Middle Grade Computer Science, Middle Grade Language Arts, Secondary Level Computer Science, Secondary Level English Language Arts, Primary Level Reading Teacher, etc.
Iowa	**102** Teacher-Elementary Classroom, **103** Teacher Prekindergarten-Kindergarten, **106** Teacher Prekindergarten through Grade 3, **119** English/Language Arts K through Grade 8, **120** English/Language Arts Grades 5 through 12, **182** Teacher-Middle School, etc.
Kansas	Early Childhood Unified, Elementary, Art, Health, Physics, Psychology, History and Government, Journalism, etc.
Missouri	Elementary Education, Middle School Science, Middle School Language Arts, Secondary Education English, Secondary Education Biology, Secondary Education Chemistry, Secondary Education Earth Science, Secondary General Science, etc.
Nebraska	Early Childhood Education, Elementary Education, English, Journalism and Mass Communications, Language Arts, Mathematics, etc.
North Dakota	**50015** Elementary Education, **50030** Kindergarten, **50017** Middle School, **05204** Language Arts Grades 5-6, **05006** Language Arts Grades 7-8, **05007** Reading Grades 7-8, **05022** Grammar Grades 9-12, **23000** Computer Science, etc.
South Dakota	**202** K-8 Elementary Education, **203** K-8 Elementary Education w/5-8 Middle Level, **204** 7-12 Secondary Education, **205** 7-12 Secondary Education w/5-8 Middle Level, **206** K-12 Special Education, **570** 7-12 Language Arts-Composite, **5710** 7-12 Language Arts: English Education-Composition/Grammar, **5720** 7-12 Language Arts: English Education-Literature, **5760** Language Arts: Speech/Debate/Drama/ Theater, etc.
Wyoming	Early Childhood, Elementary Teacher, Middle Level Language Arts, Middle Level Reading, Secondary Level English, Secondary Level Journalism, Secondary Level Reading, Secondary Level Computer Science, etc.

Within the Endorsements option, endorsement types are also defined in order to group the endorsements into categories for sorting and reporting purposes.

Endorsements must first be defined before entering a certificate type for an employee on the Certifications screen in the Employee File.

Adding an Endorsement:
1. From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Endorsements**.
2. At the Endorsements screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the endorsement type for which the endorsement will be included in the Endorsement Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding an endorsement for an existing endorsement type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

    Note: If adding a new endorsement type, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

4. Select the Active field to stipulate the endorsement type contains endorsements that are currently used when entering certificates for employees. A checkmark will appear in the box if the field is selected. When adding a new endorsement type, the Active field is selected by default.

5. If adding a new endorsement type, enter the description for the endorsement type in the Endorsement Type Description field. The description can be up to **40** characters long. If adding a new endorsement for an existing endorsement type, the description for the specified endorsement type will appear in the Endorsement Type Description field.

6. To add an endorsement to the specified endorsement type, complete the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Endorsements List, enter the ID for the new endorsement in the Endorsement ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

       Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. The Endorsement ID must be unique and <u>cannot</u> be used more than once or with multiple endorsement types.

    b. Enter the description for the new endorsement in the Endorsement Description field. The description can be up to **40** characters long.

    c. If applicable, enter the ID of the grade level tied to the particular endorsement in the Grade Level ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    d. Select the Active field to stipulate the endorsement is currently used when entering certificates for employees. A checkmark will appear in the box if the field is selected. When adding a new endorsement, the Active field is selected by default.

    e. If desired, enter any additional information to track for the endorsement in the Comments field. The comment can be up to **1,000** characters long.
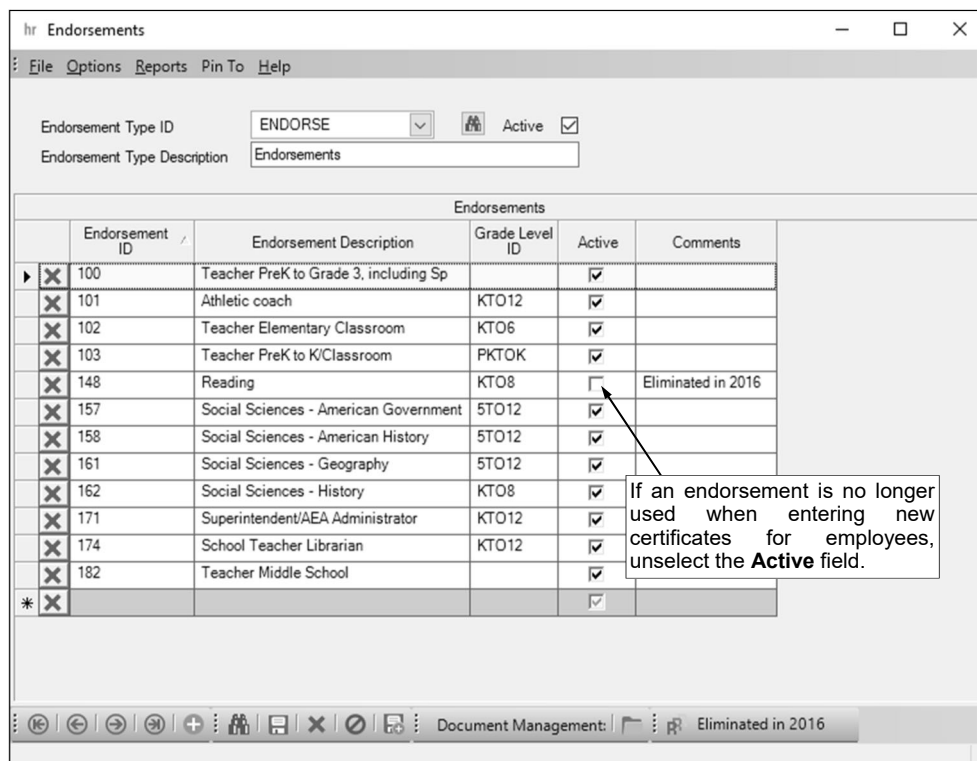
Diagram A

     f.   If applicable, repeat these steps until all the endorsements have been added for the specified endorsement type.

7.   Click the **Save** button.

<u>Changing an Endorsement</u>:
1.   From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Endorsements**.
2.   At the Endorsements screen, enter the ID of the endorsement type to change, or for which the endorsement to be changed is included, in the Endorsement Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3.   Make the desired changes.
     a.   To add a new endorsement to the specified endorsement type, complete the blank line (indicated with an asterisk) at the bottom of the Endorsements List.
     b.   To remove an endorsement from the specified endorsement type, click the **Delete** button located to the left of the desired endorsement in the Endorsements List; when prompted to delete the record, click **Yes**.

         <u>Note</u>: If an endorsement is being used on the Certificates screen of the Employee File, the system will <u>not</u> allow it to be deleted; however, the endorsement can be made inactive by removing the checkmark for the Active field (column).
4.   After all the changes have been made, click the **Save** button.
5.   If the ID for the endorsement type was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the endorsement type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.
6.   If the Active field for the endorsement type was unselected (the checkmark was removed) so the type is now inactive, a prompt will appear asking to make the endorsements within the type inactive as well; click **Yes** to inactivate the endorsements also and then click the **Save** button.
7.   If the Active field for the endorsement type was selected (a checkmark appears in the box) so the type is now active, a prompt will appear asking to make the endorsements within the type active as well; click **Yes** to activate the endorsements also and then click the **Save** button.

<u>Deleting an Endorsement</u>:
<u>Note</u>: The instructions below are for deleting an endorsement type and all the endorsements included in the endorsement type. To delete just one endorsement from a particular endorsement type, follow the instructions for changing an endorsement.
1.   From the Human Resources screen, select the **Maintenance** menu, **Certificates**, and then **Endorsements**.
2.   At the Endorsements screen, enter the ID of the endorsement type to delete in the Endorsement Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3.   Once the endorsement type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

     <u>Note</u>: If an endorsement within the specified endorsement type is being used on the Certificates screen of the Employee File, the system will <u>not</u> allow it to be deleted and all the endorsements, along with the endorsement type, will remain in the data file and be displayed on the screen. However, the endorsement type (and all the endorsements within the type, if desired) can be made inactive by removing the checkmark for the Active field (located to the right of the Endorsement Type ID field).

Custom Fields

Custom Fields, which is an option available in Accounts Payable, Fixed Asset Inventory, Human Resources, and Payroll, is used to track additional information for which there is not a predefined field. With the Custom Fields option, each school district is able to define an unlimited number of specific, user-defined fields. There are different types of custom fields that can be created, and only certain types are available in particular modules.

In Payroll and Human Resources, the following types of fields can be defined within the Custom Fields option for employees: 1) text fields (which allow up to **50** characters to be keyed into the field), 2) date fields (which allow only dates in the **mm/dd/yyyy** format to be entered into the field), 3) numeric fields (which allow up to **14** digits long (including the decimal point and comma(s) if applicable) to be entered into the field; the number will be rounded to **4** decimal places by the system if capable), and 4) referenced fields (which allow only pre-defined values to be entered into the field). Examples of custom fields defined for employees include a Summer Address field, Parking Tag Number field, and TB Test Date field. The custom fields defined as referenced fields in Payroll can be used as sorts when printing certain reports and/or checks. For example, a referenced custom field for *Building* can be added in order to track the buildings the employees work in and then various employee reports (or checks) can be printed and sorted by building.

Once created, the order the custom fields display (within the Employee File) can be changed with the Set Screen Preferences option. The custom fields defined in Payroll or Human Resources can be designated to display on the Custom Fields screen in the Employee File in only the Payroll or Human Resources module, or both modules.

Adding a Custom Field:
Note: If a custom field is added, the new field will appear for all employees in the Employee File, but can be designated to display in only the Payroll or Human Resources module, or both modules.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Custom Fields**.

2. At the Custom Fields screen, select the tab for the type of custom field to add: **Date Fields**, **Numeric Fields**, **Referenced Fields**, or **Text Fields**. Date fields allow only dates in the **mm/dd/yyyy** format to be entered into the field in the Employee File, numeric fields allow only numbers (up to **14** digits long (including the decimal point and comma(s) if applicable)) to be entered into the field, referenced fields allow only pre-defined values to be entered into the field, and text fields allow any text up to **50** characters to be keyed into the field. See **Diagram A**.

3. Click the **New Record** button.

4. Enter the name for the new custom field in the Custom Field Description field. The description can be alphanumeric, but must start with a letter, and can be up to **40** characters long.

5. Select the Display in Payroll field to have the custom field appear on the Custom Fields screen in the Employee File

Diagram A

in the Payroll module. A checkmark will appear in the box if the field is selected. This field is selected by default when adding a new custom field.

6. Select the Display in Human Resources field to have the custom field appear on the Custom Fields screen in the Employee File in the Human Resources module. A checkmark will appear in the box if the field is selected. This field is selected by default when adding a new custom field.

7. Select the Print on Payroll Reports field to have the custom field print, only if there is data entered in the field for an employee, on the applicable Payroll reports. A checkmark will appear in the box if the field is selected.

8. Select the Print on Human Resources Reports field to have the custom field print, only if there is data entered in the field for an employee, on the applicable Human Resources reports. A checkmark will appear in the box if the field is selected.
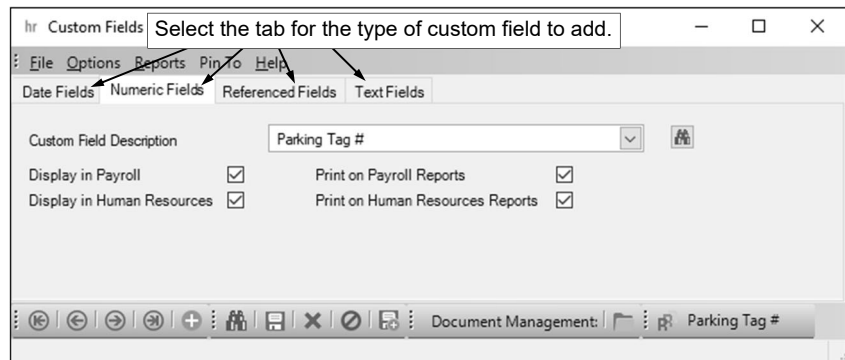
9. If adding a new referenced field, the Referenced Fields List appears. Define each value that can be entered into the custom field by completing the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Referenced Fields List, enter the ID for the value in the Referenced Field ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

        Note: **To have the system automatically assign the ID** *using the first 10 characters (letters and numbers only)* **of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

    b. Enter a description for the value in the Referenced Field Description field. The description can be up to **40** characters long.

    c. If applicable, repeat these steps until all the values have been added for the custom field.

10. Click the **Save** button.

    Tip: The order the custom fields display within the Employee File can be changed with the Set Screen Preferences option.

<u>Changing a Custom Field:</u>

<u>Note</u>: If a custom field is changed, the changes for the field will appear for all employees.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Custom Fields**.

2. At the Custom Fields screen, select the tab for the type of custom field to change: **Date Fields**, **Numeric Fields**, **Referenced Fields**, or **Text Fields**.

3. Enter the name of the custom field to change in the Custom Field Description field, or click the **down -arrow** button or the **Find** button to select the correct one.

4. Make the desired changes to the custom field.

    a. To add a new value for the custom field (for referenced fields only), complete the blank line (indicated with an asterisk) at the bottom of the Referenced Fields List.

    b. To remove a value from the custom field (for referenced fields only), click the **Delete** button located to the left of the desired value in the Referenced Fields List; when prompted to delete the record, click **Yes**.

    c. To change the order the custom fields display within the Employee File, use the Set Screen Preferences option.

5. After all the changes have been made, click the **Save** button.

6. If the description (name) of the custom field was changed, a prompt will appear verifying whether or not to change the description of the custom field. To change the description of the custom field, click the **Change** button. To <u>not</u> change the description and revert to use the original description, click the **Revert to Original** button.

<u>Deleting a Custom Field:</u>

<u>Note</u>: If a custom field is deleted, the field (and the data entered in the field) will be removed from all employees in the Employee File in both Payroll and Human Resources (if applicable). Also, if deleting a referenced custom field, all the referenced values will be deleted as well; to delete just one referenced value from a particular custom field, follow the instructions for changing a custom field.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Custom Fields**.

2. At the Custom Fields screen, select the tab for the type of custom field to delete: **Date Fields**, **Numeric Fields**, **Referenced Fields**, or **Text Fields**.

3. Enter the name of the custom field to delete in the Custom Field Description field, or click the **down-arrow** button or the **Find** button to select the correct one.

4. Once the custom field to delete is displayed on the screen, click the **Delete** button; when prompted to delete the field (and the data in the field for all employees, if applicable), click **Yes**.

    Note: If a referenced custom field is used on a check setup (on the General tab), the system will <u>not</u> allow it to be deleted.

Courses

Courses are used to define the classes taken by an employee for tracking purposes in Human Resources. A course must first be defined within the Courses option before it can be entered on the Education screen in the Employee File for an employee.

Within the Courses option, course types are also defined in order to group the courses into categories (i.e. General Studies, Business, Mathematics, Science, English, Education, etc.) for sorting and reporting purposes. In addition to grouping the courses into categories, the course types are used to specify the curriculum area studied by an employee when earning a degree for purposes of tracking the degree in Human Resources (i.e. stipulate the Bachelor of Arts degree was in Education, which is a course type).

Adding a Course:
1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Courses**.
2. At the Courses screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the course type for which the course will be included in the Course Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding a course for an existing course type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

   Note: If adding a new course type, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

4. If adding a new course type, enter the description for the course type in the Course Type Description field. The description can be up to **40** characters long. If adding a new course for an existing course type, the description for the specified course type will appear in the Course Type Description field.

5. To add a course to the specified course type, complete the following:

To add a new course, select the appropriate Course Type ID, then enter the new Course ID, Course Description, and Comments in the next available line (indicated with an asterisk).

Diagram A

   a. In the blank line (indicated with an asterisk) at the bottom of the Courses List, enter the ID of the new course in the Course ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. The Course ID must be unique and <u>cannot</u> be used more than once or with multiple course types.

   b. Enter the description for the new course in the Course Description field. The description can be up to **40** characters long.

   c. If desired, enter any additional information to track for the course in the Comments field. The comment can be up to **1,000** characters long.

d. If applicable, repeat these steps until all the courses have been added for the specified course type.

6. Click the **Save** button.

Changing a Course:
1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Courses**.
2. At the Courses screen, enter the ID of the course type to change, or for which the course to be changed is included, in the Course Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes.
    a. To add a new course to the specified course type, complete the blank line (indicated with an asterisk) at the bottom of the Courses List.
    b. To remove a course from the specified course type, click the **Delete** button located to the left of the desired course in the Courses List; when prompted to delete the record, click **Yes**.

    Note: If a course is being used on the Education screen of the Employee File, the system will not allow it to be deleted.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the course type was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the course type, click the **Change** button. To not change the ID and revert to use the original ID, click the **Revert to Original** button.

Deleting a Course:
Note: The instructions below are for deleting a course type and all the courses included in the course type. To delete just one course from a particular course type, follow the instructions for changing a course.

1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Courses**.
2. At the Courses screen, enter the ID of the course type to delete, or for which the course to be deleted is included, in the Course Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the course type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

    Note: If a course within the specified course type is being used on the Education screen of the Employee File, the system will not allow it to be deleted and all the courses, along with the course type, will remain in the data file and be displayed on the screen.

Schools

Schools are used to define the various secondary and post-secondary educational institutions from which courses were completed and/or degrees were earned by an employee for tracking purposes in Human Resources. A school must first be defined within the Schools option before it can be entered on the Education screen in the Employee File for an employee.

Within the Schools option, school types are also defined in order to group the schools into categories (for example, High Schools, Universities, Community Colleges, Technical Schools, etc.) for sorting and reporting purposes.

<u>Adding a School</u>:
1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Schools**.
2. At the Schools screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the school type for which the school will be included in the School Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding a school for an existing school type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

   Note: If adding a new school type, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,*** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. If adding a new school type, enter the description for the school type in the School Type Description field. The description can be up to **40** characters long. If adding a new school for an existing school type, the description for the specified school type will appear in the School Type Description field.
5. To add a school to the specified school type, complete the following:

   a. In the blank line (indicated with an asterisk) at the bottom of the Schools List, enter the ID of the new school in the School ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

To add a new school, select the appropriate School Type ID, then enter the new School ID and School Description in the next available line (indicated with an asterisk).

Diagram A

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,* leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. The School ID must be unique and <u>cannot</u> be used more than once or with multiple school types.

   b. Enter the description for the new school in the School Description field. The description can be up to **40** characters long.

   c. If applicable, repeat these steps until all the schools have been added for the specified school type.
6. Click the **Save** button.
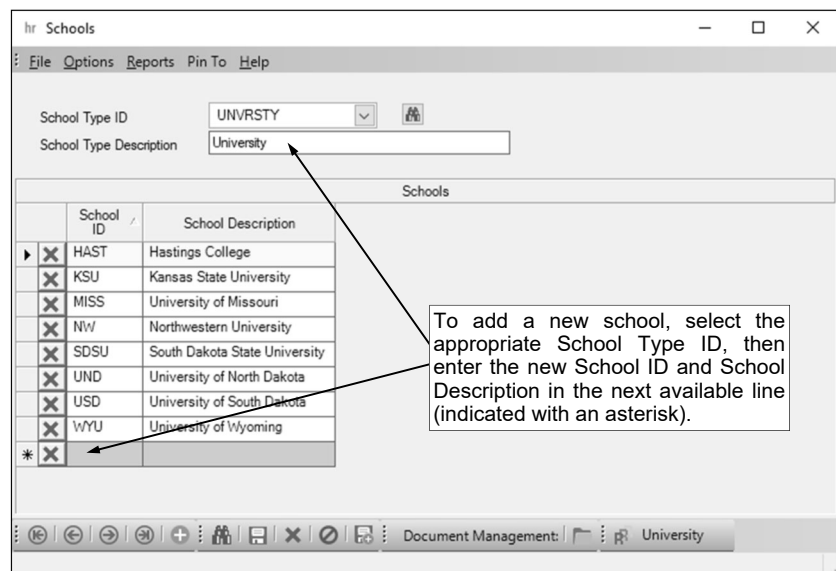
<u>Changing a School</u>:

1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Schools**.
2. At the Schools screen, enter the ID of the school type to change, or for which the school to be changed is included, in the School Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes.
    a. To add a new school to the specified school type, complete the blank line (indicated with an asterisk) at the bottom of the Schools List.
    b. To remove a school from the specified school type, click the **Delete** button located to the left of the desired school in the Schools List; when prompted to delete the record, click **Yes**.

    Note: If a school is being used on the Education screen of the Employee File, the system will <u>not</u> allow it to be deleted.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the school type was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the school type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

<u>Deleting a School</u>:
Note: The instructions below are for deleting a school type and all the schools included in the school type. To delete just one school from a particular school type, follow the instructions for changing a school.

1. From the Human Resources screen, select the **Maintenance** menu, **Education**, and then **Schools**.
2. At the Schools screen, enter the ID of the school type to delete in the School Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the school type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

    Note: If a school within the specified school type is being used on the Education screen of the Employee File, the system will <u>not</u> allow it to be deleted and all the schools, along with the school type, will remain in the data file and be displayed on the screen.

Employer History

Employer History is used to define the various employers for which employment history is tracked for an employee in Human Resources. The company or organization must first be defined within the Employer History option before it can be entered on the Employment History screen in the Employee File for an employee.

Adding an Employer:
1. From the Human Resources screen, select the **Maintenance** menu and then **Employer History**.
2. At the Employer History screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the employer in the Employer History ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the Legal Business Name (or Last Name if an individual), leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. If the company's name starts with the word "The" and "The" is entered at the beginning of the company name in the Legal Business Name field, the system will disregard "The" when automatically assigning the ID. If the ID entered in the field is for an existing entity <u>not</u> currently flagged with the entity role of Employer History, a prompt will appear asking if the Employer History role should be added; click **Yes** to make the entity an employer.
4. Select the Active field to stipulate the employer is currently active and used by the district. A checkmark will appear in the box if the field is selected. When adding a new employer, the Active field is selected by default.
5. The role(s) in which the employer is defined and used within the School Accounting System appears in the Entity Roles field. When adding a new employer, the system automatically assigns the entity role of Employer History. If more than one entity role appears, the employer can be used and accessed in all the applicable areas using the *exact same ID*.
6. ***If the employer is a company,*** enter the name of the company in the Legal Business Name field. ***If the employer is an individual,*** leave this field <u>blank</u>. The name can be alphanumeric and up to **75** characters long.

If your computer is connected to the Internet and a website is entered in the Internet Address field, click the **Go to Website** button to launch your web browser and display the website.

Diagram A

Note: If the company's name starts with the word "The", be sure to enter "The" at the beginning of the name in the Legal Business Name field; the system will disregard "The" when automatically assigning the ID (if applicable) and when searching on the Employer Name field in other areas of the system (for example, "The Life Insurance Company" becomes "Life Insurance Company, The" for sorting and searching purposes).

7. *If the employer is an individual,* enter the person's last name in the Last Name field. *If the employer is a company,* leave this field blank, or if desired, enter the last name of the person who owns the business in the Last Name field. The last name can be up to **40** characters long.

8. *If the employer is an individual,* enter the prefix (such as Dr., Mr., or Mrs.) for the person in the Prefix field if applicable, or click the **down-arrow** button to select the correct one. *If the employer is a company,* leave this field blank, or if desired, enter the prefix of the person who owns the business in the Prefix field.

9. *If the employer is an individual,* enter the suffix (such as Jr. or Sr.) for the person in the Suffix field if applicable, or click the **down-arrow** button to select the correct one. *If the employer is a company,* leave this field blank, or if desired, enter the suffix of the person who owns the business in the Suffix field.

10. *If the employer is an individual,* enter the person's first name in the First Name field. *If the employer is a company,* leave this field blank, or if desired, enter the first name of the person who owns the business in the First Name field. The first name can be up to **30** characters long.

11. *If the employer is an individual,* enter the person's middle name in the Middle Name field. *If the employer is a company,* leave this field blank, or if desired, enter the middle name of the person who owns the business in the Middle Name field. The middle name can be up to **30** characters long.

12. If the employer is a company and the correspondence should be sent directly to a specific person or department at the company, enter the name of the person or department in the Attention field. The name can be alphanumeric and up to **30** characters long.

13. Enter the address (up to two lines) for the employer in the Address 1 and Address 2 fields. The addresses can be alphanumeric and each can be up to **30** characters long.

14. Enter the city where the employer is located in the City field. The city can be alphanumeric and up to **25** characters long.

15. Enter the appropriate state abbreviation (or applicable code for the province, if located outside of the United States) for the employer in the State/Province field. If the state abbreviation or province code is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    Note: Only the state abbreviations and province codes for the specified country (as entered in the Country field, or United States if the Country field is blank) appear by default when searching, but the filters can be changed if needed in order to view other state or province codes.

16. Enter the zip code for the employer in the Zip Code field. The zip code can be alphanumeric and up to **15** characters long. The system will automatically add the dash in the zip code if 9 digits are entered, using the format of ##### - ####.

17. Enter the applicable **2-digit** code of the country where the employer is located in the Country field, or click the **down-arrow** button to select the correct one. If the State/Province field is completed, the corresponding country code will appear by default in this field and can only be changed by first deleting the state or province (or specifying a different state or province).

18. Enter up to three phone numbers (including a fax number, if applicable) for the employer in the Primary Phone Number, Secondary Phone Number, and Other Phone Number fields. Then enter the appropriate type (**Business**, **Cell**, **Fax**, **Home**, or **Other**) in the Phone Type field for each phone number entered, or click the **down-arrow** button to select the correct one. Each phone number can be up to **30** digits long. The system will automatically add the dashes for the phone numbers (if entered with numbers only) using the following formats: 1) ### - #### if 7 digits are entered; 2) ### - #### x ## if 8 or 9 digits are entered; 3) ### - ### - #### if 10 digits are entered; or 4) ### - ### - #### x ## if 11 or more digits are entered.

19. If desired, enter the address of the employer's website in the Internet Address field. The website address can be up to **50** characters long.

    Note: If your computer is connected to the Internet, click the **Go To** button located to the right of this field to launch the Internet browser and display the specified website.

20. If the employer is a company, enter the name of the person or department who should be contacted with any questions in the Contact Person field. The name can be alphanumeric and up to **30** characters long.

21. If desired, enter any additional information to track for the employer in the Comments field. The comment can be alphanumeric and up to **1,000** characters long.
22. If desired, enter the email address(es) for the employer in the Email Addresses section.
    a. Enter the business email address for the employer in the Business Email Address field. Enter a home or personal email address for the employer in the Personal Email Address field. Enter another email address for the employer, if applicable, in the Other Email Address field. The email addresses can be up to **50** characters long and must follow the proper format of "username@example.com".
    b. Disregard the fields for Direct Deposit, Tax Forms, and Other Communication as they are <u>not</u> applicable to an employer (would only be used in other areas if the employer had multiple entity roles).
23. Click the **Save** button.

<u>Changing an Employer</u>:
1. From the Human Resources screen, select the **Maintenance** menu and then **Employer History**.
2. At the Employer History screen, enter the ID of the employer to change in the Employer History ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
   <u>Note</u>: If the ID entered in the field is for an entity <u>not</u> currently flagged with the entity role of Employer History, a prompt will appear asking if the Employer History role should be added; click **Yes** to make the entity an employer.
3. Make the desired changes to the employer.
    a. To change the country for where the employer is located in the Country field, do one of the following: 1) click the **down-arrow** button for the State/Province field (or press the **Ctrl+F** keys to access the search feature), change the filters for the Country Code, and then select the appropriate state or province within the desired country; or 2) delete the information in the State/Province field, change the Country field as needed, and then complete the State/Province field again.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the employer was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the employer, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new employer with the specified ID that is a duplicate of the current employer, click the **Create New** button.

<u>Deleting an Employer</u>:
<u>Note</u>: If an employer is being used on the Employment History screen of the Employee File, the system will <u>not</u> allow it to be deleted; however, an employer that will no longer be used can be made inactive by removing the checkmark for the Active field within the Employer History File. If an employer was defined only with an Entity Role of Employer History, it will be completely deleted from the system with this process; however, if the employer had multiple Entity Roles, the ID will remain valid for the other applicable areas and just the Entity Role of Employer History will be deleted..
1. From the Human Resources screen, select the **Maintenance** menu and then **Employer History**.
2. At the Employer History screen, enter the ID of the employer to delete in the Employer History ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the employer to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Evaluation Ratings

Evaluation Ratings is an option available in Human Resources to define the various ratings or grades used when completing evaluations for employees. Within the Evaluation Ratings option, evaluation rating types are also defined in order to group the evaluation ratings into categories. A few examples of evaluation ratings and evaluation rating types are shown below.

<u>Evaluation Rating Types</u>:	<u>Evaluation Ratings</u>:
1-10 Scale	1, 2, 3, 4, 5, 6, 7, 8, 9, 10
Teacher Ratings	Satisfactory, Unsatisfactory
Classified Staff Ratings	Excellent, Good, Fair, Poor
Exempt Staff Ratings	Satisfactory, Unsatisfactory
Non-Exempt Staff Ratings	1, 2, 3, 4, 5, 6, 7, 8, 9, 10
S/U Scale	Satisfactory, Unsatisfactory

Evaluation Ratings must be defined before an evaluation rating can be specified for an employee in the Evaluations section on the Positions screen in the Employee File.

<u>Adding an Evaluation Rating</u>:
1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Ratings**.
2. At the Evaluation Ratings screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the evaluation rating type for which the evaluation rating will be included in the Evaluation Rating Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding an evaluation rating for an existing evaluation rating type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

    Note: If adding a new evaluation rating type, **to have the system automatically assign the ID** *using the first 10 characters (letters and numbers only)* **of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. If adding a new evaluation rating type, enter the description for the evaluation rating type in the Evaluation Rating Type Description field. The description can be up to **40** characters long. If adding a new evaluation rating for an existing evaluation rating type, the description for the specified evaluation rating type will appear in the Evaluation Rating Type Description field.

If adding a new evaluation rating for an existing evaluation rating type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
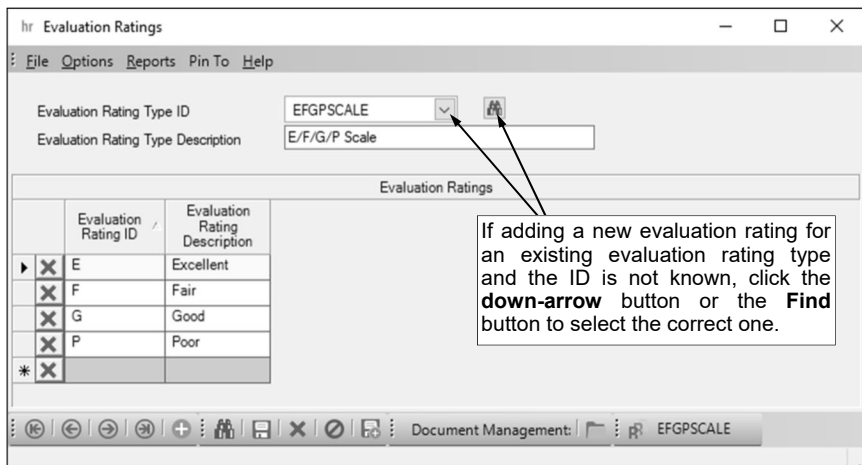
Diagram A

5. To add an evaluation rating to the specified evaluation rating type, complete the following:
    a. In the blank line (indicated with an asterisk) at the bottom of the Evaluation Ratings List, enter the ID of the new evaluation rating in the Evaluation Rating ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

        Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* **of the description,** leave the ID field blank; once the record is

saved, the ID will be assigned. The Evaluation Rating ID must be unique and <u>cannot</u> be used more than once or with multiple evaluation rating types.

    b. Enter the description for the new evaluation rating in the Evaluation Rating Description field. The description can be up to **40** characters long.

    c. If applicable, repeat these steps until all the evaluation ratings have been added for the specified evaluation rating type.

6. Click the **Save** button.

<u>**Changing an Evaluation Rating**</u>:
1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Ratings**.
2. At the Evaluation Ratings screen, enter the ID of the evaluation rating type to change, or for which the evaluation rating to be changed is included, in the Evaluation Rating Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes.

    a. To add a new evaluation rating to the specified evaluation rating type, complete the blank line (indicated with an asterisk) at the bottom of the Evaluation Ratings List.

    b. To remove an evaluation rating from the specified evaluation rating type, click the **Delete** button located to the left of the desired evaluation rating in the Evaluation Ratings List; when prompted to delete the record, click **Yes**.

    Note: If an evaluation rating is being used in the Evaluations section on the Positions screen of the Employee File, the system will <u>not</u> allow it to be deleted.

4. After all the changes have been made, click the **Save** button.
5. If the ID for the evaluation rating type was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the evaluation rating type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

<u>**Deleting an Evaluation Rating**</u>:
Note: The instructions below are for deleting an evaluation rating type and all the evaluation ratings included in the evaluation rating type. To delete just one evaluation rating from a particular evaluation rating type, follow the instructions for changing an evaluation rating.
1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Ratings**.
2. At the Evaluation Ratings screen, enter the ID of the evaluation rating type to delete in the Evaluation Rating Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the evaluation rating type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

    Note: If an evaluation rating within the specified evaluation rating type is being used in the Evaluations section on the Positions screen of the Employee File, the system will <u>not</u> allow it to be deleted and all the evaluation ratings, along with the evaluation rating type, will remain in the data file and be displayed on the screen.

Evaluation Types

Evaluation Types is an option available in Human Resources and is used to define the various kinds of evaluations completed for employees. Examples of evaluation types include Teacher Evaluation, First-Year Teacher Extra Evaluation, Administrator Evaluation, 90-day Probationary Evaluation, Annual Evaluation, Semi-Annual Evaluation, etc.

Once evaluation types are defined, a position title can be tied to a specific evaluation type (for example, the Elementary Teacher position title can be tied to the evaluation type of Teacher Evaluation) and employees can be tied to a specific evaluation type when assigned to a particular position (if different than the default tied to the position title).

Adding an Evaluation Type:
1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Types**.
2. At the Evaluation Types screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the evaluation type in the Evaluation Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

    Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. Enter the description for the evaluation type in the Evaluation Type Description field. The description can be up to **40** characters long.
5. Click the **Save** button.
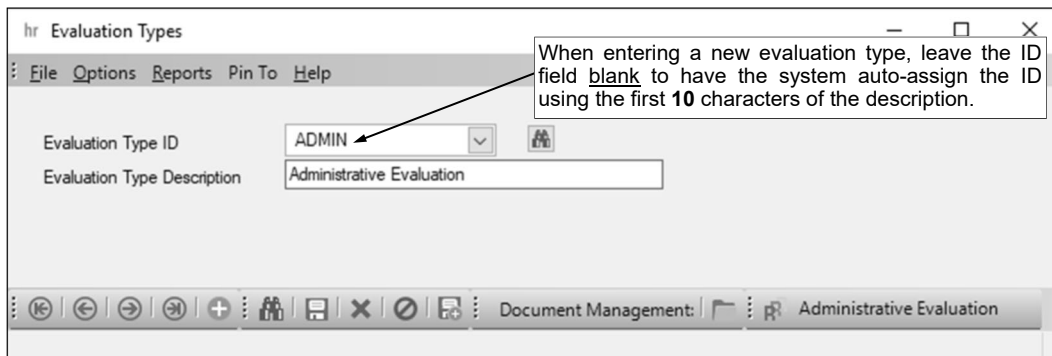
Diagram A

Changing an Evaluation Type:
1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Types**.
2. At the Evaluation Types screen, enter the ID of the evaluation type to change in the Evaluation Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes to the evaluation type.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the evaluation type was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the evaluation type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new evaluation type with the specified ID that is a duplicate of the current evaluation type, click the **Create New** button.

<u>Deleting an Evaluation Type</u>:

<u>Note</u>: If an evaluation type is tied to a position title or a specific position for an employee, the system will <u>not</u> allow it to be deleted.

1. From the Human Resources screen, select the **Maintenance** menu, **Evaluations**, and then **Evaluation Types**.

2. At the Evaluation Types screen, enter the ID of the evaluation type to delete in the Evaluation Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the evaluation type to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Sites

Sites in Human Resources define a broad area within the school district (for example, towns, campuses, etc.) where employees work and training events are held. Positions, training events, and workers' compensation injuries that are tracked in Human Resources can be tied to an appropriate site location, if desired.

Adding a Site:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Sites**.
2. At the Sites screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the site in the Site ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: **To have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,*** leave the ID field underlined blank; once the record is saved, the ID will be assigned.
4. Enter the description for the site in the Site Description field. The description can be up to **40** characters long.
5. Click the **Save** button.
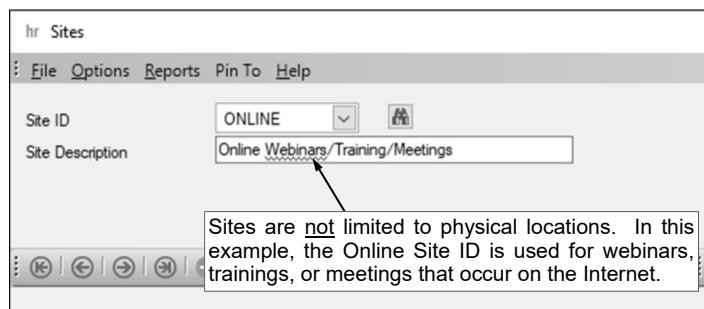
Changing a Site:
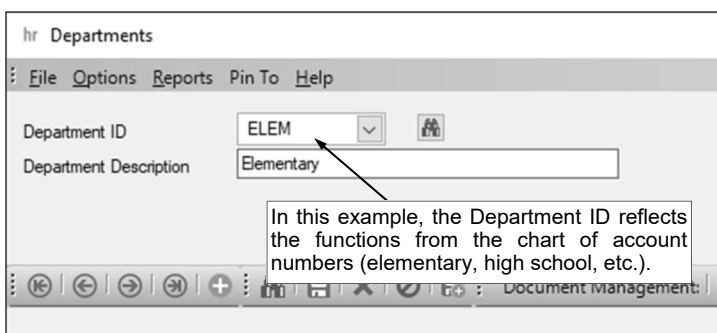1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Sites**.
2. At the Sites screen, enter the ID of the site to change in the Site ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

Diagram A

Sites are not limited to physical locations. In this example, the Online Site ID is used for webinars, trainings, or meetings that occur on the Internet.

3. Make the desired changes to the site.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the site was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the site, click the **Change** button. To not change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new site with the specified ID that is a duplicate of the current site, click the **Create New** button.

Deleting a Site:
Note: If a site is tied to a building, position, training event, or a workers' compensation injury, the system will not allow it to be deleted.
1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Sites**.
2. At the Sites screen, enter the ID of the site to delete in the Site ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the site to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Buildings/Rooms

The Buildings/Rooms option in Human Resources is used in conjunction with the Sites File (in Human Resources) to define each different building (structure) within the school district and each different room within each building where employees work and training events are held. Positions, training events, and workers' compensation injuries that are tracked in Human Resources can be tied to an appropriate building location, if desired; while training events and workers' compensation injuries can also be tied to an appropriate room location.

Adding a Building/Room:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Buildings/Rooms**.
2. At the Buildings/Rooms screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the building in the Building ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding a new room for an existing building and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

    Note: If adding a new building, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,*** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. If adding a new building, enter the ID of the site to which the building is tied in the Site ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. If adding a new room for an existing building, the site to which the building is tied will appear.
5. If adding a new building, enter the description for the new building in the Building Description field. The description can be up to **40** characters long. If adding a new room for an existing building, the description for the specified building will appear in the Building Description field.

    a. To add a room to the specified building, complete the following:
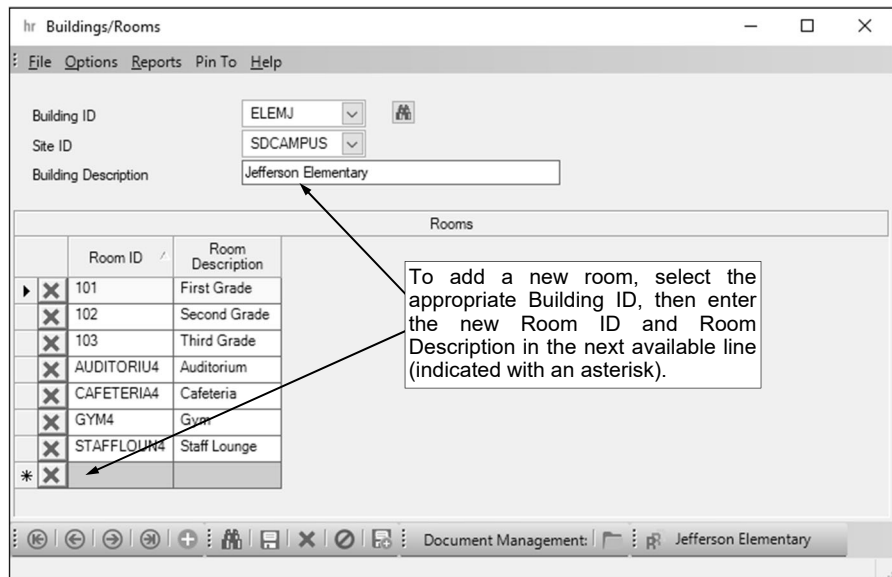
    b. In the blank line (indicated with an asterisk) at the bottom of the Rooms List, enter the ID of the new room in the Room ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

Diagram A

    Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,* leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. The Room ID must be unique and <u>cannot</u> be used more than once or with multiple buildings.

    c. Enter the description for the new room in the Room Description field. The description can be up to **40** characters long.

    d. If applicable, repeat these steps until all the rooms have been added for the specified building.
6. Click the **Save** button.

<u>Changing a Building/Room</u>:

1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Buildings/Rooms**.

2. At the Buildings/Rooms screen, enter the ID of the building to change, or for which the room to be changed is included, in the Building ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes.

    a. To add a new room to the specified building, complete the blank line (indicated with an asterisk) at the bottom of the Rooms List.

    b. To remove a room from the specified building, click the **Delete** button located to the left of the desired room in the Rooms List; when prompted to delete the record, click **Yes**.

       Note: If a room is tied to a position, training event, or a workers' compensation injury, the system will <u>not</u> allow it to be deleted.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the building was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the building, click the **Change** button. T o <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

<u>Deleting a Building/Room</u>:

Note: The instructions below are for deleting a building and all the rooms in the specific building. To delete just one room from a particular building, follow the instructions for changing a building/room.

1. From the Human Resources screen, select the **Maintenance** menu, **Positions** or **Trainings**, and then **Buildings/Rooms**.

2. At the Buildings/Rooms screen, enter the ID of the building to delete in the Building ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the building to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

   Note: If the building, or a room within the specified building, is tied to a position, training event, or workers' compensation injury, the system will <u>not</u> allow it to be deleted, and all the rooms, along with the building, will remain in the data file and be displayed on the screen.

Departments

Departments in Human Resources are used to classify employee positions into various groups for tracking and reporting purposes, if desired. Departments may be defined based on the different areas of curriculum within the school district (for example, Math, Music, Science, etc.), or used in combination with the functions from the chart of account numbers (for example, Elementary Department, Middle School Department, High School Department, etc.).

Adding a Department:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Departments**.
2. At the Departments screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the department in the Department ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only) of the description,* leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

4. Enter the description for the department in the Department Description field. The description can be up to **40** characters long.
5. Click the **Save** button.

Changing a Department:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Departments**.
2. At the Departments screen, enter the ID of the department to change in the Department ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes to the department.
4. After all the changes have been made, click the **Save** button.
5. If the ID for the department was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the department, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new department with the specified ID that is a duplicate of the current department, click the **Create New** button.

Deleting a Department:
Note: If a department is tied to a position, the system will <u>not</u> allow it to be deleted.
1. From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Departments**.
2. At the Departments screen, enter the ID of the department to delete in the Department ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Once the department to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

hr Departments

File Options Reports Pin To Help

Department ID   ELEM

Department Description Elementary

In this example, the Department ID reflects the functions from the chart of account numbers (elementary, high school, etc.).

Document Management:

Diagram A

Position Titles

The Position Titles option in Human Resources is used to define the various job titles available within the school district, such as Teacher, Principal, Custodian, and Cook. With the Position Titles option, job titles which are available in organizations outside of the school district (such as Sales Clerk, Customer Service Representative, and Bank Teller) can also be defined for tracking employer history.

Within the Position Titles option, position types are also defined in order to group the job titles into categories (such as Administration, Certified, Extracurricular, Food Service, Bus Drivers, etc.) for sorting and reporting purposes.

Once a position title has been created, a position assignment is added within the Positions option by taking a position title and specifying the position description, position location, FTE value, and the employee currently holding the position. For example, the position title of "Principal" is added (in this specific example, added three times) to create the positions of "Elementary School Principal", "Middle School Principal", and "High School Principal", and the position title of "Teacher" is added to create the positions of "First Grade Teacher", "Second Grade Teacher", and "Third Grade Teacher". The position titles created for positions which are available in organizations outside of the school district are <u>not</u> added within the Positions option.

Note: Each school district determines how detailed or general the position titles and positions are defined within the Human Resources module; when deciding what to use for position titles and positions, be sure to consider your school district's needs for reporting requirements. See the Examples of Position Titles and Positions topic in the Help File for specific samples of general and more detailed position titles and positions, and how a few reports could be generated for each.

<u>Adding a Position Title</u>:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Position Titles**.
2. At the Position Titles screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the position type for which the position title will be included in the Position Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding a position title for an existing position type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

    Note: If adding a new position type, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. If adding a new position type, enter the description for the new position type in the Position Type Description field. The description can be up to **40** characters long. If adding a new position title for an existing position type, the description for the specified position type will appear in the Position Type Description field.
5. If adding a new position type, enter the appropriate usage (**Both**, **External**, or **Internal**) for whether the position type will be used for internal or external job titles (or both) in the Position Type Usage field, or click the **down-arrow** button to select the correct one. If adding a new position title for an existing position type, the usage defined for the specified position type will appear in the Position Type Usage field.
6. To add a position title to the specified position type, complete the following:
    a. In the blank line (indicated with an asterisk) at the bottom of the Position Titles List, enter the ID of the new position title in the Position Title ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

        Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned. The Position Title ID must be unique and <u>cannot</u> be used more than once or with multiple position types.

Enter or select the ID of the evaluation type to use as the default for the specified position, if desired.
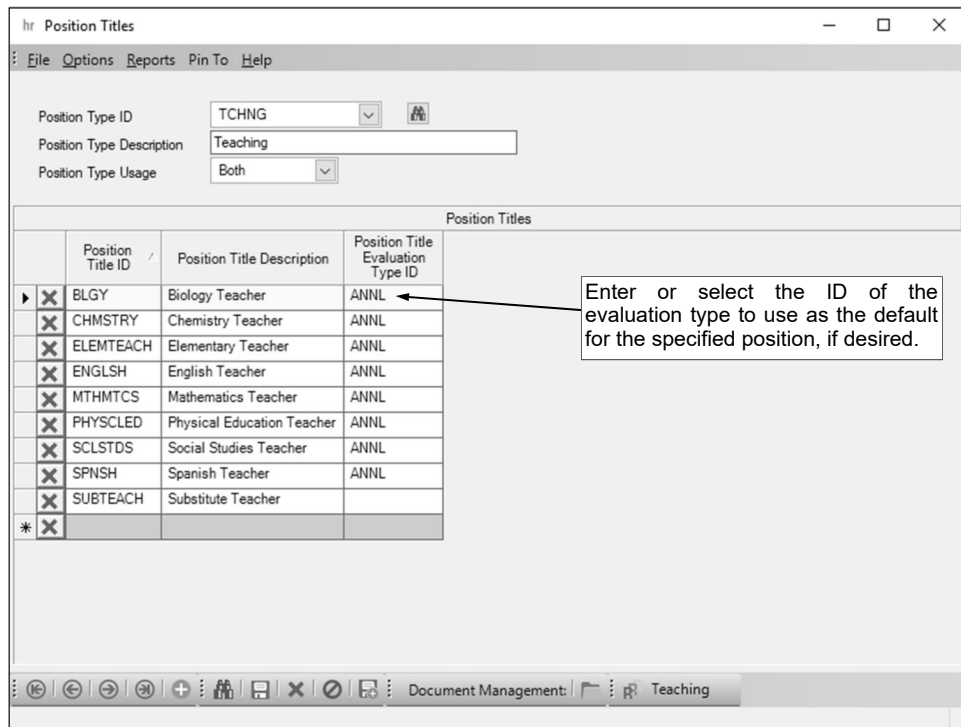
Diagram A

    b.   Enter the description for the new position title in the Position Title Description field. The description can be up to **40** characters long.

    c.   Enter the ID of the evaluation type to use as the default for the specified position title in the Position Title Evaluation Type ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    d.   If applicable, repeat these steps until all the position titles have been added for the specified position type.

7.   Click the **Save** button.

Changing a Position Title:
1.   From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Position Titles**.
2.   At the Position Titles screen, enter the ID of the position type to change, or for which the position title to be changed is included, in the Position Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3.   Make the desired changes.

    a.   To add a new position title to the specified position type, complete the blank line (indicated with an asterisk) at the bottom of the Position Titles List.

    b.   To remove a position title from the specified position type, click the **Delete** button located to the left of the desired position title in the Position Titles List; when prompted to delete the record, click **Yes**.

         Note: If a position title is being used with a position, or entered on the Employment History screen for an employee in the Employee File, the system will <u>not</u> allow it to be deleted.

4.   After all the changes have been made, click the **Save** button.
5.   If the ID for the position type was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the position type, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

Deleting a Position Title:
Note: The instructions below are for deleting a position type and all the position titles included in the position type. To delete just one position title from a particular position type, follow the instructions for changing a position title.
1.   From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Position Titles**.

2. At the Position Titles screen, enter the ID of the position type to delete in the Position Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the position type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

    <u>**Note:**</u> If a position title within the specified position type is being used with a position, or entered on the Employment History screen for an employee in the Employee File, the system will <u>not</u> allow it to be deleted and all the position titles, along with the position type, will remain in the data file and be displayed on the screen.

Positions

The Positions option in Human Resources is used to define the specific employment assignments within the school district by taking a position title and entering the position description, position location (including the site, building, and department), and FTE value. Once a position has been added, employees can then be tied to the position, either from within the Positions option or on the Positions screen in the Employee File.

All the positions, including those entered and currently assigned to employees, and those that may be open (vacant) or no longer active, are saved as history within the Positions option. The history of who held each position and when can also be viewed from within the Positions option.

Note: Each school district determines how detailed or general the position titles and positions are defined within the Human Resources module; when deciding what to use for position titles and positions, be sure to consider your school district's needs for reporting requirements. See the Examples of Position Titles and Positions topic in the Help File for specific samples of general and more detailed position titles and positions, and how a few reports could be generated for each.

Adding a Position:
1. From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Positions**.
2. At the Positions screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter the ID of the position title to add as a position within the school district in the Position Title ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.

   Note: Only the position titles with a Position Type Usage of Internal or Both can be entered or selected for this field.
4. Enter a description for the specific position assignment in the Position Description field, if desired. The description can be up to **50** characters in length.

Diagram A

5. Enter the ID of the site where the employee holding the position will be located in the Site ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

6. Enter the ID of the building where the employee holding the position will be located in the Building ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

7. Enter the ID of the department for which the position is included in the Department ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

8. Enter the FTE for the position in the Position FTE Value field, if desired. The number for the FTE can be up to **6** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

    Note: If the position will be split amongst two or more employees who are sharing the job, enter only the total FTE for the position in this field; then when tying the employees to the particular position, the FTE for each individual employee can be specified.

9. Enter the phone number by which the employee holding the position can be reached in the Office Phone Number field, if desired. The system will automatically add the dashes for the phone number using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.

10. If applicable (and only if <u>not</u> entered as part of the phone number in the Office Phone Number field), enter the extension by which the employee holding the position can be reached in the Extension field, if desired.

11. If applicable, enter the cell phone number associated with the position in the Cell Phone Number field, if desired. The system will automatically add the dashes for the cell phone number using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.

12. Select the Active field to stipulate the position is currently available within the school district and is either filled by an employee or open (vacant) and waiting to be filled. A checkmark will appear in the box if the field is selected. When adding a new position, this field is selected by default.

13. To tie an employee to the position, complete the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Position Employees List (located in the upper right corner of the screen), enter the ID of the employee holding the position in the Employee ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    b. Enter the ID of the evaluation type used for the employee in the specified position in the Evaluation Type ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. The evaluation type as entered for the particular position title in the Position Title File will appear as the default, but can be changed if needed.

    c. Enter the FTE for the particular employee for the specified position in the Position Employee FTE Value field, if desired. The number can be up to **6** digits long (including the decimal point) and will be rounded to **4** decimal places by the system. The FTE for the position will appear as the default, but can be changed if needed.

        Note: If the position is split amongst two or more employees who are sharing the job, enter only the FTE for the particular employee here, and then enter the additional employee(s) to the position with the remaining FTE value(s).

    d. Enter the date when the employee started working in the specified position in the Position Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

    e. Leave the Position End Date field <u>blank</u> when adding an employee who is currently in the specified position.

        Note: Only complete the Position End Date field if the employee is no longer working in the specified position or the employee will stop working in the position on a certain date in the near future (as will indicate the position is open and waiting to be filled). If entering an end date, use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

f.　If applicable, repeat these steps until all the employees have been tied to the specified position.

　　　　Note: If desired, employees can also be tied to a position from within the Employee File (on the Positions screen).

14.　Click the **Save** button.

　　Note: If a position does <u>not</u> have an employee assigned, or there are employees assigned but with both the Position Start Date and Position End Date fields completed, the position is considered open (vacant).

<u>**Changing a Position:**</u>
1.　From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Positions**.
2.　At the Positions screen, double-click the position to change from the Positions List that appears on the bottom of the screen, or click the **Find** button to select the correct one.
3.　Make the desired changes to the position.
　　a.　To change the Site ID for where the employee holding the position will be located, delete the information in the Building ID field first; then after changing the Site ID, complete the Building ID field.
　　b.　To add an employee to the specified position, complete the blank line (indicated with an asterisk) at the bottom of the Position Employees List (located in the upper right corner of the screen).
　　c.　To remove an employee from the specified position, click the **Delete** button located to the left of the desired employee in the Position Employees List (located in the upper right corner of the screen); when prompted to delete the record, click **Yes**.

　　　　Note: To retain the history of all employees who worked in a position, do <u>not</u> delete an employee from a position; instead, enter the date the employee stopped working in the position in the Position End Date field.
4.　After all the changes have been made, click the **Save** button.

<u>**Deleting a Position:**</u>
Note: The instructions below are for deleting a position. To delete just one employee from a particular position, follow the instructions for changing a position.
1.　From the Human Resources screen, select the **Maintenance** menu, **Positions**, and then **Positions**.
2.　At the Positions screen, double-click the position to delete from the Positions List that appears on the bottom of the screen, or click the **Find** button to select the correct one.
3.　Once the position to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

　　Note: If a position is tied to one or more employees, the system will <u>not</u> allow it to be deleted.

Trainings

The Trainings option in Human Resources is used to define the various seminars or workshops that employees attend. Within the Trainings option, both internal trainings (those held within the school district and presented by either internal staff or external experts, such as a CPR Training held at the school district for all employees) and external trainings (those held outside of the school district and presented by external experts, such as a Coaching Clinic) can be tracked.

Within the Trainings option, training types are also defined in order to group the trainings into categories (for example, Administrative Trainings, Food Service Trainings, Safety Trainings, Technical Trainings, etc.) for sorting and reporting purposes.

Once a training has been entered within the Training File, a training event is added (within the Training Events option) to define the date, time, and location for where the training will be held. Employees can then be tied to the training events, either from within the Training Events option or on the Trainings screen in the Employee File.

<u>Adding a Training</u>:
1. From the Human Resources screen, select the **Maintenance** menu, **Trainings**, and then **Trainings**.
2. At the Trainings screen, click the **New Record** button.

    <u>Note</u>: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique ID for the training type for which the training will be included in the Training Type ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). If adding a new training for an existing training type and the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one. See **Diagram A**.

    <u>Note</u>: If adding a new training type, **to have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description,** leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.
4. If adding a new training type, enter the description for the new training type in the Training Type Description field. The description can be up to **40** characters long. If adding a new training for an existing training type, the description for the specified training type will appear in the Training Type Description field.
5. To add a training to the specified training type, complete the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Trainings List, enter the ID of the new training in the Training ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

    <u>Note</u>: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is
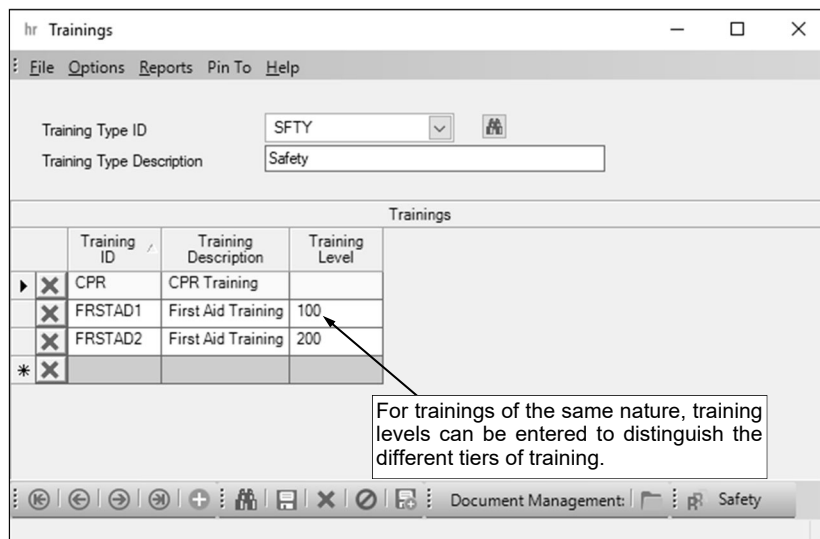
Diagram A

saved, the ID will be assigned. The Training ID must be unique and <u>cannot</u> be used more than once or with multiple training types.

    b.   Enter the description for the new training in the Training Description field. The description can be up to **40** characters long.

    c.   Enter the level of the training in relation to the other trainings of the same nature (for example, if there are "basic" and "advanced" trainings for a particular workshop, or "Part I" and "Part II", etc.) in the Training Level field, if applicable. The description for the level can be up to **50** characters long.

    d.   If applicable, repeat these steps until all the trainings have been added for the specified training type.

6.   Click the **Save** button.

<u>Changing a Training</u>:

1.   From the Human Resources screen, select the **Options** menu and then **Training Events**.

2.   At the Training Events screen, double-click the training event to change from the Scheduled Events List that appears on the right side of the screen, or click the **Find** button to select the correct one.

    Note: Only the training events with an Event Status of Scheduled appear by default in the Scheduled Events List, but the filters can be changed if needed; if using the **Find** button to search, all the training events appear by default.

3.   Make the desired changes to the training event.

    a.   To change the Building ID for where the training event will be held, delete the information in the Room ID field first; then after changing the Building ID, complete the Room ID field.

    b.   To change the Site ID for where the training event will be held, delete the information in the Room ID and Building ID fields first; then after changing the Site ID, complete the Building ID and Room ID fields.

    c.   If the Event Status field was changed to Held, a message will appear asking whether to select the Training Event Attended field (located in the Event Roster List) for all the employees tied to the training event; to update all the employees who currently do <u>not</u> have the field selected, click **Yes**.

    d.   To add an employee to the specified training event, complete the blank line (indicated with an asterisk) at the bottom of the Event Roster List.

    e.   To remove an employee from the specified training event, click the **Delete** button located to the left of the desired employee in the Event Roster List; when prompted to delete the record, click **Yes**.

4.   After all the changes have been made, click the **Save** button.

5.   If desired, complete the Send Email option at this time to send an email message to the employees tied to the training event.

<u>Deleting a Training</u>:

Note: The instructions below are for deleting a training type and all the trainings included in the training type. To delete just one training from a particular training type, follow the instructions for changing a training.

1.   From the Human Resources screen, select the **Maintenance** menu, **Trainings**, and then **Trainings**.

2.   At the Trainings screen, enter the ID of the training type to delete in the Training Type ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3.   Once the training type to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

    Note: If a training within the specified training type is being used in the Training Events option, the system will <u>not</u> allow it to be deleted and all the trainings, along with the training type, will remain in the data file and be displayed on the screen.

EMPLOYEE FILE

Employees

Employees are used to define the personnel (staff members) of the school district paid during a Payroll check cycle. The Employees option is located in Payroll and Human Resources, but can also be accessed from Negotiations, if applicable.

Each employee has a record in the Employee File, which contains specific information for that employee. The following information is included in each employee's record for Payroll purposes: Name and Address, ACA 1095s, ACA Hours, Custom Fields, Deductions, Direct Deposit, Emergency Contacts, Employment, Leaves, Taxes, and Wages. The following information is included in each employee's record for Human Resources: Name and Address, ACA 1095s, ACA Hours, Benefits, Certificates, Custom Fields, Demographics, Dependents, Education, Emergency Contacts, Employment, Employment History, FMLA, Leaves, Military Service, Positions, Trainings, and Workers' Compensation. For the information that applies to both Payroll and Human Resources, if the data is changed in one module, the changes are reflected in the other module as well because the data fields (screens) are shared between the two modules. For example, if a change is made to the middle name for an employee from within one module, the change is reflected in both modules.

The various screens of information that display within the Employee File and the order is defined within the Set Screen Preferences option for a user; therefore, if a particular screen of information will <u>not</u> be tracked (utilized) by the user or even the school district, the screen (tab) can be hidden. Also, a user can have screen specific rights set (within the User Security option) so that the user does <u>not</u> have access to a particular screen within the Employee File; and, override rights can be set for the Federal ID field (Social Security Number field) that appears on the applicable screens, if desired.

<u>Adding an Employee:</u>
Note: If applicable, the Employee File is shared between Payroll and Human Resources, so if an employee is added in one module, the employee will automatically appear in the Employee File in the other module as well. Also, the instructions listed below explain each tab (screen) within the Employee File as they appear when the screen preferences are set to the defaults. If the screen preferences were changed, the tabs may be out of order as described below and there may even be tabs that do <u>not</u> appear on your screen. If desired, the default screen preferences can be restored.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Employees**.

   Note: If a calculate payroll batch has been created and <u>not</u> yet updated, a message will appear stating a payroll is in progress and the changes may not take effect until the batch is recalculated; click **OK**. Also, if desired, to access the Employee File from Negotiations (if applicable), select the **Payroll** menu from the Negotiations screen and then **Employees**.

2. At the Employees screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Click the **Name & Address** tab to complete the name and address information for the employee.

4. Click the **ACA 1095s** tab to complete the information required on the 1095-C or 1095-B forms.

5. Click the **ACA Hours** tab to complete the information for utilizing the Affordable Care Act (ACA) Hours Tracking option.

6. For those school districts with the Human Resources module, click the **Benefits** tab to complete the benefit information for the employee.

7. For those school districts with the Human Resources module, click the **Certificates** tab to complete the educational certifications/licensure for the employee.

8. Click the **Custom Fields** tab to complete the custom field information for the employee.

9. Click the **Deductions** tab to complete the deduction information for the employee.

10. For those school districts with the Human Resources module, click the **Demographics** tab to complete the demographic information for the employee.

11. For those school districts with the Human Resources module, click the **Dependents** tab to track the dependents of the employee and the benefits for which the dependent is enrolled (covered).

12. Click the **Direct Deposit** tab to complete the direct deposit information for the employee.

13. For those school districts with the Human Resources module, click the **Education** tab to track the education of the employee, including the degree(s) obtained by the employee and/or any continuing education for the employee.

14. Click the **Emergency Contacts** tab to complete the emergency contact and medical information for the employee.
15. Click the **Employment** tab to complete the employment information for the employee.
16. For those school districts with the Human Resources module, click the **Employment History** tab to track the employment history of the employee.
17. For those school districts with the Human Resources module, click the **FMLA** tab to track any family and medical leave requests made by the employee, along with any payments made by the employee, such as for benefits, while on leave.
18. Click the **Leaves** tab to complete the leave information for the employee.
19. For those school districts with the Human Resources module, click the **Military Service** tab to track the military service history of the employee, if applicable.
20. For those school districts with the Human Resources module, click the **Positions** tab to enter the position(s) within the school district that the employee holds, and to enter the evaluation information for a position, if desired.

    Note: Employees can also be tied to a position from within the Positions File, if desired.
21. Click the **Taxes** tab to complete the tax information for the employee.
22. For those school districts with the Human Resources module, click the **Trainings** tab to enter the trainings that the employee has participated in or is registered to attend, if desired.

    Note: Employees can also be added to a training from within the Training Events option, if desired.
23. Click the **Wages** tab to complete the wage information for the employee.
24. For those school districts with the Human Resources module, click the **Work Comp** tab to track any workers' compensation injuries incurred by the employee, along with claims, claim payments, treatments, and lost work information related to the injury.
25. After all the information is entered for the new employee, click the **Save** button.
26. Verify that the Cross References on the Taxes, Wages, and Deductions screens are correct for each item for the employee.

Changing an Employee:
Note: If applicable, the Employee File is shared between Payroll and Human Resources, so if the information on a screen that is for both Payroll and Human Resources is changed, the data is updated in both modules.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Employees**.

   Note: If a calculate payroll batch has been created and <u>not</u> yet updated, a message will appear stating a payroll is in progress and the changes may not take effect until the batch is recalculated; click **OK**. Also, if desired, to access the Employee File from Negotiations (if applicable), select the **Payroll** menu from the Negotiations screen and then **Employees**.
2. At the Employees screen, enter the ID of the employee to change in the Employee ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

   Note: If the specified employee is included in a calculate payroll batch that has <u>not</u> been updated, a warning will appear in the status bar stating a payroll is in progress for the employee. If the ID entered in the field is for an entity <u>not</u> currently flagged with the entity role of Employee, a prompt will appear asking if the Employee role should be added; click **Yes** to make the entity an employee and then specify the correct status when prompted.

   Tip: The **Find** button in the Employee File automatically filters to show only those employees with a status of Active (unless the Show Inactive on Employee File Search field is selected in the Human Resources System File); to view all employees, change the filters for the Active field <u>and</u> the Employee field on the search screen.
3. Make the desired changes to the employee.
   a. To make an employee inactive so that the employee no longer gets paid, select the Active field on the Name and Address screen to remove the checkmark.

      Note: If the employee is made inactive and the employee is also a user (as defined within the User Security option), a prompt will appear (when saving) asking to also inactivate the user tied to the employee.
   b. If the employee has entries included in an unposted data entry batch, or is included in a calculate payroll batch that has <u>not</u> been updated, the employee <u>cannot</u> be inactivated (the checkmark <u>cannot</u> be removed from the Active field). If the Active field is selected, a message will appear stating the employee cannot be inactivated; click **OK**.

c. To change the country in the Country field for the employee, do one of the following: 1) click the **down-arrow** button for the State/Province field (or press the **Ctrl+F** keys to access the search feature), change the filters for the Country Code, and then select the appropriate state or province within the desired country; or 2) delete the information in the State/Province field, change the Country field as needed, and then complete the State/Province field again.

d. To delete a record listed (entered) in a grid for the employee (for example, a benefit (only if <u>not</u> a COBRA benefit or <u>not</u> tied to a dependent), a payment, a dependent, or a degree), click the **Delete** button to the left of the desired item; when prompted, click **Yes** to delete the record. To delete a record <u>not</u> listed (entered) in a grid for the employee (for example, a certificate, a deduction, a leave, a pay code, or a previous employer record), first select to bring up the item to delete by double-clicking the item in the list displayed on the screen and then click the **Delete** button located at the bottom of the screen; when prompted, click **Yes** to delete the record.

   Note: If the item has previously been used and has history tied to it, the item <u>cannot</u> be deleted; however, if applicable, make the item inactive by removing the checkmark from the Active field.

e. If there are information changes made from within the Web Link module that need to be reviewed and processed for the employee, the **Employee Personal Changes** button will appear in green (to the right of the tab name including the pending changes and also at the bottom of the screen). If applicable, click the **Employee Personal Changes** button at the bottom of the screen to process the changes.

f. If there is a checklist instance in Human Resources with tasks still pending for the employee, the **Open Checklist Instance** button will appear in green; if desired, click the button to open the checklist instance for the employee to view and complete the tasks as needed.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the employee was changed, a prompt will appear verifying whether or not to change the ID. To change the ID for the employee, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button.

   Note: If the ID was changed (by clicking the **Change** button), the system will check to see if the particular employee is tied to a user in the User Security option in which the User ID matches the Employee ID, and if so, a prompt will appear stating there is a User ID matching the Employee ID; if you are a supervisor, click **Yes** to also change the User ID to match the updated Employee ID (or click **No** to leave the User ID as is), or if you are <u>not</u> a supervisor, click **OK** and then notify a supervisor to update the User ID within the User Security option.

<u>Deleting an Employee</u>:
Note: If applicable, the Employee File is shared between Payroll and Human Resources, so when an employee is deleted from the Employee File in one module, the employee is removed from both modules. If an employee was defined only with an Entity Role of Employee, it will be completely deleted from the system with this process; however, if the employee had multiple Entity Roles, the ID will remain valid for the other applicable areas and just the Entity Role of Employee will be deleted. If an employee has been paid in Payroll or is tied to any positions, training events, or checklist instances in Human Resources, the system will <u>not</u> allow it to be deleted; however, an employee that will no longer be used can be made inactive by removing the checkmark for the Active field within the Employee File.

1. From the Payroll or Human Resources screen, select the **Maintenance** menu and then **Employees**.

   Note: If a calculate payroll batch has been created and <u>not</u> yet updated, a message will appear stating a payroll is in progress and the changes may not take effect until the batch is recalculated; click **OK**. Also, if desired, to access the Employee File from Negotiations (if applicable), select the **Payroll** menu from the Negotiations screen and then **Employees**.

2. At the Employees screen, enter the ID of the employee to delete in the Employee ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

   Note: If the specified employee is included in a calculate payroll batch that has <u>not</u> been updated, a warning will appear in the status bar stating a payroll is in progress for the employee; the employee <u>cannot</u> be deleted.

   Tip: The **Find** button in the Employee File automatically filters to show only those employees with a status of Active (unless the Show Inactive on Employee File Search field is selected in the Human Resources System File); to view all employees, change the filters for the Active field <u>and</u> the Employee field on the search screen.

3. Once the employee to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Name and Address Screen (Employees)

Completing the Name and Address Screen in the Employee File:

1. From within the Employee File, click the **Name & Address** tab.

2. Enter a unique ID for the employee in the Employee ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID *using the first 10 characters (letters only) of the name entered in the Last Name field,* leave the ID field blank; once the record is saved, the ID will be assigned. If the ID entered in the field is for an existing entity not currently flagged with the entity role of Employee, a prompt will appear asking if the Employee role should be added; click **Yes** to make the entity an employee and then specify the correct status when prompted.

3. The role(s) in which the employee is defined and used within the School Accounting System appears in the Entity Roles field. When adding a new employee, the system automatically assigns the entity role of Employee. If more than one entity role appears, the employee can be used and accessed in all the applicable areas using the *exact same ID*.

4. Select the Active field to stipulate the employee is currently active (working and getting paid by the district). A checkmark will appear in the box if the field is selected. When adding a new employee, the Active field is selected by default.

   Tip: The employee must be selected as Active in order to get paid or be included in a Payroll check cycle.

   Note: To make an employee inactive so that the employee no longer gets paid, select this field to remove the checkmark. If an employee is made inactive and the employee is also a user (as defined within the User Security option), a prompt will appear (when saving) asking to also inactivate the user tied to the employee.

Diagram A

5. Enter the appropriate status (**Deceased**, **Disabled**, **Hired**, **Leave of Absence**, **Retired**, or **Terminated**) for the employee in the Employee Status field, or click the **down-arrow** button to select the correct one. If the employee has passed away, enter **Deceased**. If the employee is disabled, enter **Disabled**. If the employee is currently employed at the school district, enter **Hired**. If the employee is on a leave of absence, but will be returning to work at the district, enter **Leave of Absence**. If the employee retired from working at the school district, enter **Retired**. If the employee does not work at the school district any longer due to a voluntary or involuntary termination (however, did not retire from the school district), enter **Terminated**. The default of **Hired** will appear, but can be changed.

6. Leave the Legal Business Name field <u>blank</u>, as typically the employee will be an individual and will have the First, Middle, and Last Name fields completed instead.

7. Enter the last name of the employee in the Last Name field. The last name can be up to **40** characters long.

8. If applicable, enter the prefix (such as Dr., Mr., or Mrs.) for the person in the Prefix field, or click the **down-arrow** button to select the correct one.

9. If applicable, enter the suffix (such as Jr. or Sr.) for the person in the Suffix field, or click the **down-arrow** button to select the correct one.

10. Enter the first name of the employee in the First Name field. The first name can be up to **30** characters long.

11. Enter the middle name or the middle initial of the employee in the Middle Name field, if desired. The middle name can be up to **30** characters long.

12. If correspondence for the employee should be sent directly to a specific person or department, enter the name of the person or department in the Attention field. The name can be alphanumeric and up to **30** characters long.

13. Enter the address (up to two lines) for the employee in the Address 1 and Address 2 fields. The addresses can be alphanumeric and each can be up to **30** characters long.

14. Enter the city for the employee in the City field. The city can be alphanumeric and up to **25** characters long.

15. Enter the appropriate state abbreviation (or applicable code for the province, if located outside of the United States) for the employee in the State/Province field. If the state abbreviation or province code is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    Note: Only the state abbreviations and province codes for the specified country (as entered in the Country field, or United States if the Country field is <u>blank</u>) appear by default when searching, but the filters can be changed if needed in order to view other state or province codes.

16. Enter the zip code for the employee in the Zip Code field. The zip code can be alphanumeric and up to **15** characters long. The system will automatically add the dash in the zip code if 9 digits are entered, using the format of ##### - ####.

17. Enter the applicable **2-digit** code of the country for the employee in the Country field, or click the **down-arrow** button to select the correct one. If the State/Province field is completed, the corresponding country code will appear by default in this field and can only be changed by first deleting the state or province (or specifying a different state or province).

18. Enter up to three phone numbers (including a fax number, if applicable) for the employee in the Primary Phone Number, Secondary Phone Number, and Other Phone Number fields. Then enter the appropriate type (**Business**, **Cell**, **Fax**, **Home**, or **Other**) in the Phone Type field for each phone number entered, or click the **down-arrow** button to select the correct one. Each phone number can be up to **30** digits long. The system will automatically add the dashes for the phone numbers (if entered with numbers only) using the following formats: 1) ### - #### if 7 digits are entered; 2) ### - #### x ## if 8 or 9 digits are entered; 3) ### - ### - #### if 10 digits are entered; or 4) ### - ### - #### x ## if 11 or more digits are entered.

19. If desired, enter the address of the website for the employee in the Internet Address field. The website address can be up to **50** characters long.

    Note: If your computer is connected to the Internet, click the **Go To** button located to the right of this field to launch the Internet browser and display the specified website.

20. If applicable, enter the name of the person who should be contacted with any questions in the Contact Person field. The name can be alphanumeric and up to **30** characters long.

21. Enter any additional information to track for the employee in the Comments field, if desired. The comment can be alphanumeric and up to **8,000** characters long.

22. If desired, enter the familiar name used by the employee in the Nickname field. The nickname can be up to **30** characters long.

23. If applicable, enter the previous last name of the employee, such as from before a marriage or a divorce, in the Previous Last Name field. The name can be up to **40** characters long.

24. If applicable, enter the date when the last name of the employee changed in the Last Name Changed Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

25. The Address Changed Date field is disabled (<u>cannot</u> be changed) and will be updated with the date when one of the address information fields for the employee is changed after the data is initially entered and saved. The address information includes the following fields: Address 1, Address 2, City, State/Province, Zip Code, Country, Attention, Primary Phone Number, Secondary Phone Number, Other Phone Number, Phone Type, Internet Address, and Contact Person.

    Tip: This field is <u>blank</u> for a new employee and will only be updated with a date if one of the address information fields (previously entered and saved) is changed in the future.

26. For districts who have licensed the Web Link module, the Web Link 1095 Consent and Web Link W2 Consent fields indicate whether or not the employee has consented to receiving an electronic 1095 and/or W2 via Web Link (no paper copy needed). The consent for each is given by the employee through Web Link and the fields are updated automatically based on the Web Link responses. A checkmark will appear in the box if a field is selected indicating the employee has given consent. Typically, the Web Link 1095 Consent and Web Link W2 Consent fields should <u>not</u> be changed within the Employee File as any change to the consents should be made by the employee in Web Link.

27. If desired, enter the email address(es) for the employee in the Email Addresses List.

    a. Enter the employee's work email address in the Business Email Address field. Enter the employee's home or personal email address in the Personal Email Address field. Enter another email address for the employee, such as a spouse's email address, in the Other Email Address field. The email addresses can be up to **50** characters long and must follow the proper format of "username@example.com".

    b. Specify the uses for each email address by selecting the appropriate usage fields (Direct Deposit, Tax Forms, and/or Other Communication fields). If the employee will be set up for direct deposit and the direct deposit stub should be emailed to the employee using the particular email address during a Payroll check cycle, select the Direct Deposit field. If the employee should be emailed tax forms, including W2s and 1095s, using the particular email address, select the Tax Forms field. If the employee will be sent other email communications, such as notification messages or reports, from within the School Accounting System using the particular email address, select the Other Communication field. A checkmark will appear in the box if the field is selected.

28. Click the **Save** button.

29. Continue adding the remaining information for the employee if needed.

Benefits Screen (Employees)

Completing the Benefits Screen in the Employee File:
Note: The Benefits screen is only available in the Employee File if the school district has the Human Resources module. If desired, utilize the Adjust Benefits option (instead of following the instructions below) to quickly add a benefit to a group of employees all at once.

1. From within the Employee File, click the **Benefits** tab.
2. To add a benefit to the employee, complete the Benefits section by entering the following:
   a. Enter the ID of the benefit in the Benefit ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
      Note: Only the active benefits appear by default when searching, but the filters can be changed if needed.
   b. If applicable, enter the description of the benefit level for which option of the benefit the employee is enrolled in the Benefit Level Description field. If the description is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.
   c. If applicable, enter the date the letter for creditable coverage was received from the employee in the Creditable Coverage Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
   d. If desired, enter the date the employee enrolled in the benefit, or the date the benefit enrollment became effective, in the Enrollment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
   e. If applicable, enter the date the employee waived enrollment in the benefit in the Waived Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
   f. If applicable, enter the date the employee withdrew from enrollment of the benefit, or the date the benefit coverage ended, in the Withdrawal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
   g. If a benefit level was entered or selected in the Benefit Level Description field, the type of that benefit level appears in the Benefit Level Type field indicating how the rate for the particular level is based. The Benefit Level Type <u>cannot</u> be changed.

Diagram A

h.   If a benefit level was entered or selected in the Benefit Level Description field, the standard rates for that benefit level, if applicable, appear in the Employee Benefit Level Rate, Employer Benefit Level Rate, and Benefit Level Rate Total fields and cannot be changed.

i.   If the benefit level does not have standard rates (the Employee Benefit Level Rate, Employer Benefit Level Rate, and Benefit Level Rate Total fields are blank), or if the employee has *different* rates than the standard ones that appear, enter the amount paid by the employee for the benefit in the Employee Override Rate field and the amount paid by the employer in the Employer Override Rate field. The amounts can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system. The system will automatically calculate the total of the two amounts and display the total in the Override Rate Total field.

j.   If desired, enter any additional information to track for the employee and the benefit or benefit level in the Comments field. The comment can be up to **1,000** characters long.

k.   If the benefit for the employee was converted to COBRA coverage, enter the reason for the change to COBRA, such as Termination of Employment or Reduction in Hours Worked, in the COBRA Reason field, or click the **down-arrow** button to select the correct one.

   Note: If the COBRA Reason field is completed, the COBRA Start Date field must also be completed.

l.   If the benefit for the employee was converted to COBRA coverage, enter the date when the coverage changed to COBRA in the COBRA Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   Note: If the COBRA Start Date field is completed, the COBRA Reason field must also be completed.

m.   If applicable, enter the date when the COBRA coverage for the benefit ended in the COBRA End Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

n.   If the rate of the benefit for the employee is different during the COBRA coverage, enter the rate in the COBRA Rate field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

o.   Click the **Save** button.

3.   If desired, complete the Benefit Payments section to track the payments made for a specific benefit for the employee. For each payment, enter the following:

   Note: In most cases, this section will only be used to track payments made for the benefit if the employee is not currently working at the district but is getting the benefit and the benefit is paid by the individual employee; for example, use this section if an employee is able to continue health care coverage for up to one year after retirement, and the employee will write a check to the school district for the amount of health insurance who in turn pays the health insurance company. The history of payments made for benefits during a Payroll check cycle are not reflected here, but are available in Payroll, if needed.

a.   Enter the date the payment was made in the Payment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

b.   Enter the amount of the payment for the benefit in the Payment Amount field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

c.   If desired, enter any additional information to track for the payment of the benefit in the Comments field. The comment can be up to **1,000** characters long.

d.   If the payment was made while the employee was on an FMLA leave, enter the FMLA leave request associated with the payment in the FMLA Reason/Date field. If desired, click the **down-arrow** button to select the correct one.

   Note: If an FMLA leave is tied to the payment, the payment will also display on the FMLA screen in the Employee File for the specified leave.

e.   Click the **Save** button.

4.   The COBRA Payments section will only appear if a benefit was converted to COBRA coverage (the COBRA Reason and COBRA Start Date fields are completed). If applicable, complete the COBRA Payments section to track the payments made for the COBRA coverage of the benefit for the employee, if desired. For each payment, enter the following:

a.   Enter the date the payment was made for the COBRA coverage of the benefit in the Payment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

b. Enter the amount of the payment for the COBRA coverage of the benefit in the Payment Amount field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

c. If desired, enter any additional information to track for the payment for the COBRA coverage of the benefit in the Comments field. The comment can be up to **1,000** characters long.

d. Click the **Save** button.

5. If applicable, repeat Steps 2-4 until all the applicable benefits and/or payments have been added for the specified employee.

   Tip: A benefit can be added multiple times for the employee as long as the data is unique in the first six fields (Benefit ID, Benefit Level Description, Creditable Coverage Date, Enrollment Date, Waived Date, and Withdrawal Date).

6. Continue adding the remaining information for the employee if needed.

Adjust Benefits:
The Adjust Benefits option is accessed from within the Employee File in Human Resources (and Payroll and Negotiations, if applicable). The Adjsut Benefits option is used to quickly add a benefit to a specific group of employees (and dependents, if desired) all at once, rather than adding the benefit individually on the Benefits screen (and Dependents screen) in the Employee File for each employee. With the Adjust Benefits option, a benefit can be added to selected employees or to those employees with an existing benefit already set up in their files (for example, add Benefit B to all employees (and their dependents, if desired) who are set up with Benefit A). Also, the Adjust Benefits option can be used to change the current information for a particular benefit for a specific group of employees (for example, change the Enrollment Date to 9/1/2019 for a particular benefit for all active employees who currently have the benefit).

1. From the Human Resources screen, select the **Maintenance** menu and then **Employees**.

   Note: The Employee File can also be accessed from Payroll or Negotiations (if applicable), but the Adjust Benefits option will only be visible if the organization has licensed the Human Resources module.

2. At the Employees screen, select the **Options** menu and then **Adjust Benefits**.

3. The Adjust Benefits screen will appear. See **Diagram B**.

4. Enter the ID of the benefit to add (or update) to the desired employees in the Benefit ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

5. If applicable, enter the description of the benefit level to assign to the employees for the benefit in the Benefit Level Description field. If the description is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

6. If desired, enter the date to assign to the employees for when the letter for creditable coverage for the benefit was received in the Creditable Coverage Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

7. If desired, enter the date to assign to the employees for when they were enrolled in the benefit, or when the benefit enrollment became effective, in the Enrollment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

8. If desired, enter the date to assign to the employees for when they waived enrollment in the benefit in the Waived Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

9. If desired, enter the date to assign to the employees for when they withdrew from enrollment of the benefit, or when the benefit coverage ended, in the Withdrawal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

10. Only if the benefit (or selected benefit level) does <u>not</u> have standard rates, or if the employees for which the benefit will be added or changed have *different* rates than the standard ones, enter the amount to assign to the employees for what is paid by the employee for the benefit in the Employee Override Rate field, and the amount paid by the employer in the Employer Override Rate field. The amounts can be up to **14** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **2** decimal places by the system.

11. If desired, enter any additional information to assign to the employees for the benefit in the Comments field. The comment can be up to **1,000** characters long.
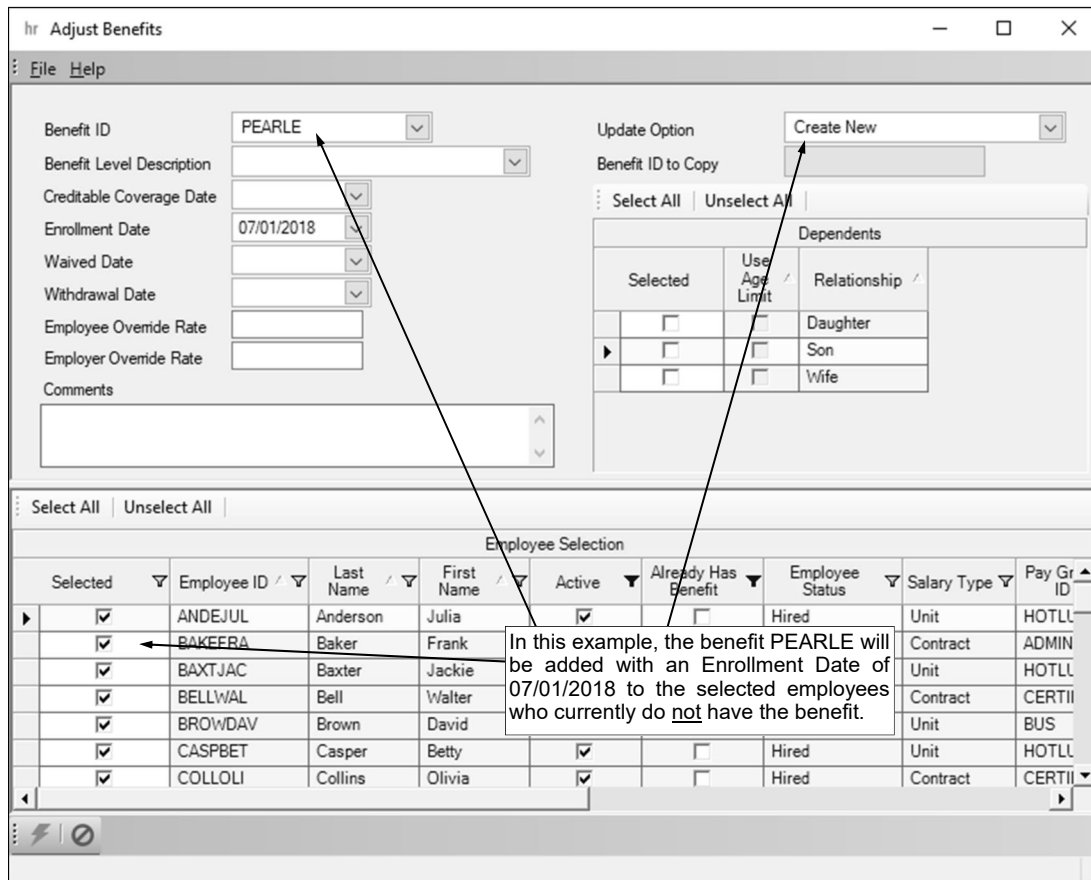
Diagram B

12. Enter the function to complete (**Copy Existing**, **Copy Existing with Dependents**, **Create New**, or **Update Existing**) in the Update Option field, or click the **down-arrow** button to select the correct one. To add the specified benefit to only those employees with a particular benefit already set up in their files (for example, add Benefit B to all employees who are set up with Benefit A), enter **Copy Existing**. To add the specified benefit to only those employees and their dependents with a particular benefit already set up in their files (for example, add Benefit B to all employees and their dependents who are set up with Benefit A), enter **Copy Existing with Dependents**. To add the specified benefit to a group of employees (who currently do not have the benefit), enter **Create New**. To change the information to what is specified in the particular fields for the selected benefit for a group of employees (who currently have the benefit), enter **Update Existing**.

Note: If **Copy Existing** or **Copy Existing with Dependents** is specified as the Update Option, the new benefit will be added to the selected employees using the same information as defined for the existing benefit for Creditable Coverage Date, Enrollment Date, Waived Date, Employee Override Rate, Employer Override Rate, and Comments, unless new information is entered in these fields while completing this option; all other fields will be blank or use the information specified in the fields while completing this option (for example, the Benefit Level Description field for the newly added benefit will be blank for the employees unless one is specified while completing this option).

13. If **Copy Existing** or **Copy Existing with Dependents** was selected as the Update Option, the Benefit ID to Copy field is enabled. Enter the ID for which benefit the employees (and dependents, if applicable) must have already set up in their files in order to the get the new benefit added in the Benefit ID to Copy field. If the ID is not known, click the **down-arrow** button to select the correct one.

14. If **Copy Existing**, **Create New**, or **Update Existing** was selected as the Update Option, the Dependents List is enabled. If desired, to add the benefit to dependents of the employees who are getting the benefit added or updated, complete the Dependents List as follows:

a. In the Dependents List, specify the groups of dependents (based on their relationship with the employees) for which to add the benefit in the Dependents List by clicking the box for the Selected column to the left of the desired relationship. A checkmark will appear in the box if the

relationship is selected. To select all the relationships listed on the screen, click the **Select All** button located above the Dependents List.

    b. If applicable, select the Use Age Limit field for any relationship in which to have the system only add the benefit to the dependents in that group if the dependent is <u>not</u> over the Dependent Age Limit or Student Age Limit (if applicable) as defined for the benefit. A checkmark will appear in the box if the field is selected.

    Note: The Use Age Limit field is only enabled if the benefit being added or updated is set up with a Dependent Age Limit or Student Age Limit.

Note: If **Copy Existing with Dependents** is specified as the Update Option, the Dependents List is disabled and <u>not</u> applicable, as the benefit will only be added to the dependents who had the other benefit already set up (selected) in their files.

15. If **Copy Existing**, **Copy Existing with Dependents**, or **Create New** was selected as the Update Option, all the *active* employees who currently do <u>not</u> have the benefit appear in the Employee Selection List (on the bottom half of the screen); if **Update Existing** was selected as the Update Option, all the *active* employees who currently have the benefit appear instead. In the Employee Selection List, specify which of the employees to update by clicking the box for the Selected column to the left of the desired employee. A checkmark will appear in the box if the employee is selected. To select all the employees listed on the screen, click the **Select All** button located above the Employee Selection List. If desired, change the filters to modify the employees displayed here.

    Note: If Update Existing is specified as the Update Option and an employee has a benefit entered more than once in the Employee File (with different data in the first six fields), the employee will be listed multiple times in the Employee Selection List; in this case, select the benefit line(s) to update for the employee.

16. Click the **Execute** button to add or change the benefit for the selected employees (and dependents, if applicable) as specified.

17. When prompted, click **Yes** to continue.

18. After the process is completed, the system will display a message in the status bar.

Certificates Screen (Employees)

Completing the Certificates Screen in the Employee File:

Note: The Certificates screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Certificates** tab.

2. To add a certificate to the employee, complete the following:

    a. Click the **New Record** button.

    b. Enter the **two-digit** state abbreviation for where the certificate or license was issued in the State field, or click the **down-arrow** button to select the correct one.

    c. Select the Active field to stipulate the certificate is currently active for the employee. A checkmark will appear in the box if the field is selected. When adding a new certificate for an employee, the Active field is selected by default.

    d. Complete the applicable fields depending on the specific state (see the state specific instructions below for Idaho, Illinois, Iowa, Kansas, Missouri, Nebraska, North Dakota, South Dakota, Wyoming, and All Other States). See **Diagram A**.

Diagram A

Idaho:

- Enter the education ID number printed on the certificate in the Education ID field. The number can be alphanumeric and up to **15** characters long. See **Diagram B**.

Diagram B

- If applicable, enter the requirements needed to renew the certificate in the Renewal Requirements field. The requirements can be up to **1,000** characters long.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

Illinois:

- Enter the number printed on the certificate in the Number field. The number can be alphanumeric and up to **15** characters long. See **Diagram C**.

- Enter the date the certificate was issued in the Issued field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the date the certificate is to be renewed by in the Renewal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the number of years (up to **2** digits) for which the certificate is valid in the Years Valid field.

Diagram C

- If desired, enter the date when the certificate expires in the Expires field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the ID of the grade level for which the certificate is valid in the Valid For field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

Iowa:
- If the certificate being entered is the initial (main) license for the employee, select the Primary Certificate field. A checkmark will appear in the box if the field is selected. See **Diagram D**.

- Enter the folder number printed on the license in the Folder Number field. The number can be alphanumeric and up to **15** characters long.

Diagram D

- Enter the date the license was issued in the License Issue Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the date when the license expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

Kansas:
- Enter the number printed on the license in the License Number field. The number can be alphanumeric and up to **15** characters long. See **Diagram E**.

- Enter the date the license became effective in the Effective field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the date when the license expires in the Expiration field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the requirements needed to renew the license in the Renewal Requirements field. The requirements can be up to **1,000** characters long.

Diagram E

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- If applicable, in the Degree section, select which of the degrees earned by the employee are tied to the license by clicking the box under the Selected column for the appropriate degrees. A checkmark will appear in the box if the degree is selected.

- Click the **Save** button.

Missouri:
- Enter the number printed on the certificate in the Certificate Number field. See **Diagram F**. The number can be alphanumeric and up to **15** characters long. This is a required field, and so if the employee has an e-certificate which does not have a certificate number, enter **ECERT** (as the field cannot be left blank).

Diagram F

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- If applicable, in the Degree section, select which of the degrees earned by the employee are tied to the license by clicking the box under the Selected column for the appropriate degrees. A checkmark will appear in the box if the degree is selected.

- Click the **Save** button.

Nebraska:
- Enter the number printed on the certificate in the Certificate field. The number can be alphanumeric and up to **15** characters long. See **Diagram G**.

- Enter the date the license became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram G

- Enter the date when the license expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter any limitations noted on the certificate in the Limitations field. The limitations can be up to **1,000** characters long.

- If applicable, enter the rank associated with the certificate in the Rank field. The rank can be alphanumeric and up to **50** characters long.

- If applicable, enter the level for which the certificate is applicable in the Level field. The level can be alphanumeric and up to **50** characters long.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

North Dakota:
- Enter the level of the license in the License Level field. The level can be alphanumeric and up to **50** characters long. See **Diagram H**.

Diagram H

- Enter the title designation for the license in the Title field. The title can be alphanumeric and up to **50** characters long.

- Enter the number of years (up to **2** digits) for which the license is valid in the Term field.

- Enter the date the license was issued in the Issued field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the date when the license expires in the Expires field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the number printed on the license in the License Number field. The number can be alphanumeric and up to **15** characters long.

- If applicable, enter any restrictions noted on the license in the Restrictions field. The restrictions can be up to **1,000** characters long.

- If applicable, enter the requirements needed to renew the license in the Re-Education Requirements field. The requirements can be up to **1,000** characters long.

- If applicable, in the Degree section, select which of the degrees earned by the employee are tied to the license by clicking the box under the Selected column for the appropriate degrees. A checkmark will appear in the box if the degree is selected.

- Also, in the Degree section, for each selected degree, enter the ID of the grade level for which the major and minor (if applicable) is valid in the Major Level field and Minor Level field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

South Dakota:
- Enter the number printed on the certificate in the Certificate Number field. The number can be alphanumeric and up to **15** characters long. See **Diagram I**.

- Enter the date the certificate was issued in the Date Issued field. Use the **mm/dd/ yyyy** format or click the **down-arrow** button to select the desired date.

- Enter the date when the certificate expires in the Expiration field. Use the **mm/dd/ yyyy** format or click the **down-arrow** button to select the desired date.

Diagram I

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- If applicable, in the Degree section, select which of the degrees earned by the employee are tied to the certificate by clicking the box under the Selected column for the appropriate degrees. A checkmark will appear in the box if the degree is selected.

- Click the **Save** button.

Wyoming:
- Enter the date the certificate became effective in the From field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. See **Diagram J**.

- Enter the date when the certificate expires in the To field. Use the **mm/ dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram J

- If applicable, enter the requirements needed to renew the certificate in the Renewal Requirements field. The requirements can be up to **1,000** characters long.

- Enter the number printed on the certificate (for example, the employee's social security number) in the Certificate Number field. The number can be alphanumeric and up to **15** characters long. This is a required field; however, if you do <u>not</u> wish to re-enter the employee's social security number since it is already tracked on the Employment screen, enter **SSN** in this field (as the field <u>cannot</u> be left <u>blank</u>).

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

All Other States:

- If the certificate being entered is the initial (main) certificate for the employee, select the Primary Certificate field. A checkmark will appear in the box if the field is selected. See **Diagram K**.

- If applicable, enter the number printed on the certificate in the Certificate Number field. The number can be alphanumeric and up to **15** characters long.

- If applicable, enter the title designation for the certificate in the Certificate Title field. The title can be alphanumeric and up to **50** characters long.

- If applicable, enter the level of the certificate in the Certificate Level field. The level can be alphanumeric and up to **50** characters long.

Applies To: hr

State	MN	Active ☑
Primary Certificate	☑	
Certificate Number	12-109274	
Certificate Title		
Certificate Level		
Grade Level	6TO12	
Issue Date	07/01/2020	
Renewal Date		
Expiration Date	06/30/2025	
Years Valid		
Restrictions		
Renewal Requirements		
Comments		

For all other states certificates, complete the applicable fields.

Degree

Selected	School Description	Degree	Graduation Date
☑	South Dakota State University	Bachelor of Science in Education	05/30/2007

Diagram K

- If applicable, enter the ID of the grade level for which the certificate is valid in the Grade Level field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

- If applicable, enter the date the certificate was issued in the Issue Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the date the certificate is to be renewed by in the Renewal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the date when the certificate expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- If applicable, enter the number of years (up to **2** digits) for which the certificate is valid in the Years Valid field.

- If applicable, enter any restrictions noted on the certificate in the Restrictions field. The restrictions can be up to **1,000** characters long.

- If applicable, enter the requirements needed to renew the certificate in the Renewal Requirements field. The requirements can be up to **1,000** characters long.

- If applicable, in the Degree section, select which of the degrees earned by the employee are tied to the certificate by clicking the box under the Selected column for the appropriate degrees. A checkmark will appear in the box if the degree is selected.

- Also, in the Degree section, for each selected degree, enter the ID of the grade level for which the major and minor (if applicable) is valid in the Major Level field and Minor Level field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

- If desired, enter any additional information to track for the certificate in the Comments field. The comment can be up to **1,000** characters long.

- Click the **Save** button.

3. To add the certificate details, complete the following:

   a. Click the **New Record** button that appears at the top of the Certificate Details section.

   b. On the Employee Certificate Endorsements screen, enter the ID of the certificate type for the employee in the Certificate Type ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

   c. Then complete the applicable fields depending on the specific state (see the state specific instructions below for Idaho, Illinois, Iowa, Kansas, Missouri, Nebraska, North Dakota, South Dakota, Wyoming, and All Other States).

Idaho:
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

    ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram L**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.
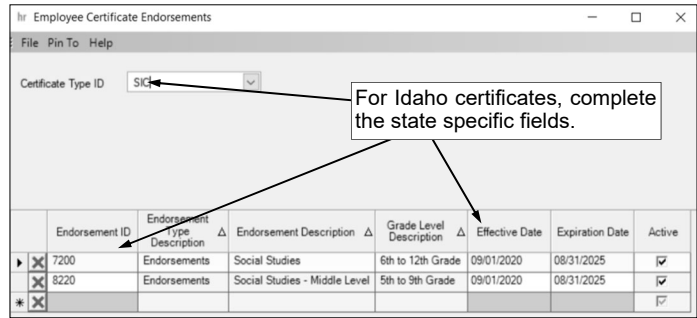
Diagram L

    ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description, and Active fields, and cannot be changed.

    Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does not stipulate if the specified endorsement is active or inactive on the employee's certificate.

    ° Enter the date the endorsement became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    ° Enter the date the endorsement expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.
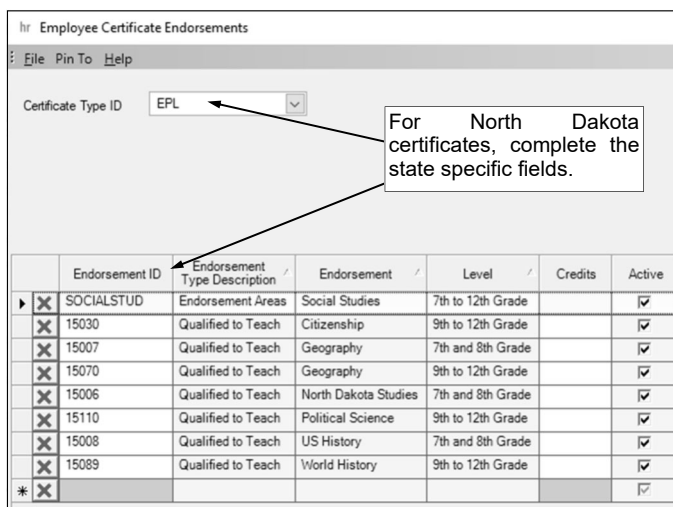
- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

Illinois:
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

    ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram M**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.
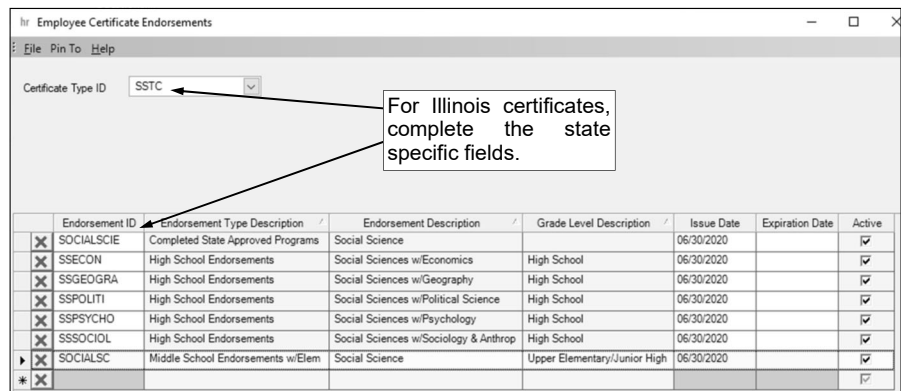
Diagram M

- ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

     Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

  - ° If applicable, enter the date the endorsement was issued in the Issue Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

  - ° If applicable, enter the date the endorsement expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

Iowa:

- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:
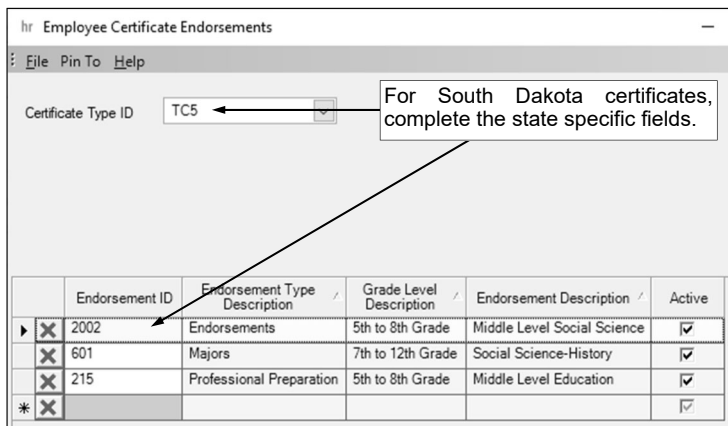
  - ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram N**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

Diagram N

  - ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

    Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.
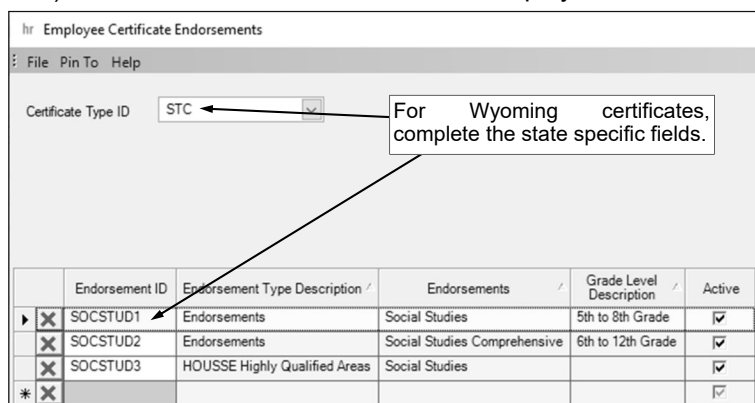
- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

Kansas:

- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  - ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram O**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

○ The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

Diagram O

○ If applicable, enter the date the endorsement became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

Missouri:
- Enter the date the certificate type expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. See **Diagram P**.

- If applicable, select the Renewable field to stipulate that the certificate type can be renewed by the employee. A checkmark will appear in the box if the field is selected.

- If applicable, select the Lifetime field to stipulate that the certificate type is a lifetime certificate and does <u>not</u> need to be renewed. A checkmark will appear in the box if the field is selected.

Diagram P

- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

○ Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

○ The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description, and Active fields, and <u>cannot</u> be changed.

Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

○ Enter the date the endorsement became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

<u>**Nebraska**</u>**:**
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram Q**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.
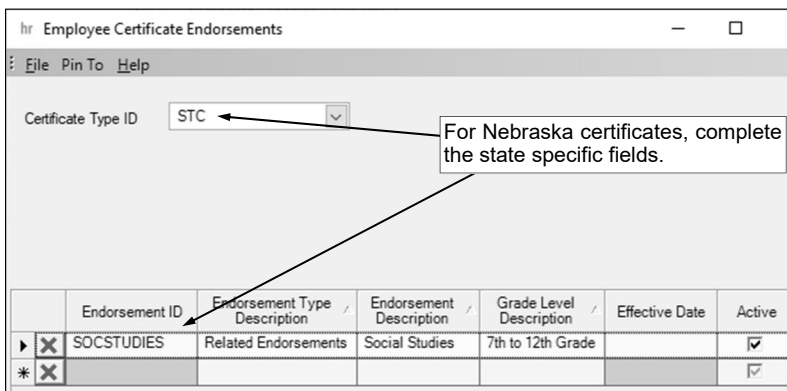
Diagram Q

  ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

    Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

  ° If applicable, enter the date the endorsement became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

<u>**North Dakota**</u>**:**
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram R**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

  ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement (which is the Endorsement Description), Level (which is the Grade Level Description, if applicable), and Active fields, and <u>cannot</u> be changed.

Diagram R

Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

- ° If applicable, enter the number of credits associated with the specified endorsement in the Credits field.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

<u>**South Dakota:**</u>
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  - ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram S**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

Diagram S

  - ° The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Grade Level Description (if applicable), Endorsement Description, and Active fields, and <u>cannot</u> be changed.

    Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

<u>**Wyoming:**</u>
- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  - ° Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram T**.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

Diagram T

- º The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsements (which is the Endorsement Description), Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

  Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

<u>All Other States:</u>

- If applicable, enter the ID of the grade level for which the certificate type is valid in the Grade Level ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram U**.

  - If applicable, enter the date the certificate type became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

  - If applicable, enter the date the certificate type expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram U

- If applicable, select the Renewable field to stipulate that the certificate type can be renewed by the employee. A checkmark will appear in the box if the field is selected.

- If applicable, select the Lifetime field to stipulate that the certificate type is a lifetime certificate and does <u>not</u> need to be renewed. A checkmark will appear in the box if the field is selected.

- Complete the Endorsements grid (section) for each endorsement listed on the employee's certificate and tied to the specified certificate type by entering the following:

  - º Enter the ID of the endorsement in the Endorsement ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    Note: Only the active endorsements appear by default when searching, but the filters can be changed if needed.

  - º The information for the specified endorsement (as defined in the Endorsements File) will display in the Endorsement Type Description, Endorsement Description, Grade Level Description (if applicable), and Active fields, and <u>cannot</u> be changed.

    Note: The Active field is only indicating if the endorsement ID is defined as Active within the Endorsements File, and does <u>not</u> stipulate if the specified endorsement is active or inactive on the employee's certificate.

  - º If applicable, enter the date the endorsement became effective in the Effective Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

  - º If applicable, enter the number of credits associated with the specified endorsement in the Credits field.

  - º If applicable, enter the date the endorsement expires in the Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

- After all the endorsements have been entered for the specified certificate type, click the **Save** button.

- To enter additional certificate types for the particular certificate, click the **New Record** button located at the bottom of the Employee Certificate Endorsements screen and repeat Step 3 until all certificate types and endorsements have been entered for the employee.

- When finished, click the **X** in the upper right-corner to close the screen.

4. If applicable, repeat Steps 2-3 until all the educational certifications/licensure have been added for the specified employee.

5. Continue adding the remaining information for the employee if needed.

Custom Fields (Employees)

Completing the Custom Fields Screen in the Employee File:

1. From within the Employee File, click the **Custom Fields** tab.

   Tip: The different sections of the custom field types can be moved around the screen as desired. To move a section, click on the handle (line of dots to the left of the section name) and then drag the section to the desired location. The settings for the section location are saved by user.

2. If applicable, complete the custom fields in the Date Fields section. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. See **Diagram A**.

3. If applicable, complete the custom fields in the Numeric Fields section. The amounts entered in the numeric custom fields can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system.

4. If applicable, complete the custom fields in the Referenced Fields section. For the referenced custom fields, enter the ID of the applicable value in the field; or if the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

5. If applicable, complete the custom fields in the Text Fields section. The data entered into the text custom fields can be alphanumeric and up to **50** characters long.

6. Click the **Save** button.

7. Continue adding the remaining information for the employee if needed.

Diagram A

Demographics Screen (Employees)

Completing the Demographics Screen in the Employee File:

Note: The Demographics screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Demographics** tab. See **Diagram A**.
2. Enter the number of the employee's driving license in the Driver's License Number field. The number can be alphanumeric and up to **15** characters long.
3. Enter the type of the employee's driving license (such as Operator License, Commercial License, or Learner Permit) in the Driver's License Type field, or click the **down-arrow** button to select the correct one.
4. Enter the date the employee's driving license expires in the Driver's License Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
5. Enter the **2-character** state abbreviation of the state where the employee's driving license was issued in the Driver's License State field, or click the **down-arrow** button to select the correct one.
6. If applicable, enter the date a motor vehicle report for the employee was received in the Motor Vehicle Report Received Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
7. If desired, enter the number of another form of identification for the employee in the Other ID Number field. The number can be alphanumeric and up to **15** characters long.
8. If the Other ID Number field is completed, enter the type of the other form of identification (such as Birth Certificate, Passport, or School ID Card) in the Other ID Type field, or click the **down-arrow** button to select the correct one.
9. If desired, enter the date the employee's other form of identification expires in the Other ID Expiration Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
10. If applicable, enter the date when the employee had fingerprints taken in the Fingerprints Taken Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
11. If applicable, enter the date when the employee had a physical examination completed in the Physical Examination Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram A

12. Enter any additional demographic information to track for the employee in the Comments field, if desired. The comment can be alphanumeric and up to **1,000** characters long.

13. If applicable, complete the Background Check Dates List with the date(s) when a background check was completed for the employee. To add a date, complete the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Background Check Dates List, enter the date when a background check was completed in the Background Check Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    b. If desired, enter any additional information to track for the background check date in the Comments field. The comment can be up to **1,000** characters long.

    Tip: To remove a date, click the **Delete** button to the left of the desired record; when prompted, click **Yes** to delete the record.

14. Click the **Save** button.

15. Continue adding the remaining information for the employee if needed.

Dependents Screen (Employees)

Completing the Dependents Screen in the Employee File:
Note: The Dependents screen is only available in the Employee File if the school district has the Human Resources module; however, dependents can also be entered on the ACA 1095s screen for organizations that self-insure. If the dependent information is changed in one place, the changes are reflected in the other place as well.

1. From within the Employee File, click the **Dependents** tab.

2. To add a dependent to the employee, complete the Dependents and ACA Coverage Dates section by entering the following:

    a. In the blank line (indicated with an asterisk) at the bottom of the Dependents and ACA Coverage Dates List, enter the first name for the dependent in the First Name field. The first name can be up to **30** characters long. See **Diagram A**.

    a. Enter the middle name or the middle initial for the dependent in the Middle Name field, if desired. The middle name can be up to **30** characters long.

    b. Enter the last name for the dependent in the Last Name field. The last name can be up to **40** characters long.

    c. If applicable, enter the suffix (such as Jr. or Sr.) for the dependent in the Suffix field, or click the **down-arrow** button to select the correct one.

    d. If desired, enter the relationship between the employee and the dependent (such as Child, Daughter, Husband, Son, or Wife) in the Relationship field, or click the **down-arrow** button to select the correct one.

    e. If desired, in the Gender field, enter the sex (**Female** or **Male**) of the dependent, or click the **down-arrow** button to select the correct one.

    f. If desired, enter the dependent's social security number in the Federal ID field. The system will automatically add the dashes.

        Note: The Federal ID field may <u>not</u> appear or may be locked if your user rights to the Federal ID field were overridden within the User Security option to have no access or read only access.

Diagram A

h. If desired, enter the dependent's date of birth in the Birth Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

i. If the dependent is a full-time student, select the Student field. A checkmark will appear in the box if the field is selected.

j. If the benefits for the dependent do <u>not</u> ever expire, select the Benefits Never Expire field. A checkmark will appear in the box if the field is selected.

k. The age (in years) of the dependent is automatically calculated and displayed in the Age field. The age is calculated based on the current date of the computer, and <u>cannot</u> be changed.

l. If needed, click the plus sign (**+**) in the box to the left of the dependent's name to expand the record; then complete the ACA coverage dates for the dependent by entering the applicable dates in the blank line (indicated with an asterisk) at the bottom of the list.

   Tip: The dates entered in the Dependents and ACA Coverage Dates List will determine the months selected for the calendar year for the dependents on Part III in columns (d) or (e) on the 1095-C forms (for large employers) or on Part IV in columns (d) or (e) on the 1095-B forms (for small employers). If this is the first year issuing the 1095 forms from within the School Accounting System, enter the dates as pertaining to only the current calendar year being reported and do <u>not</u> worry about entering the actual enrollment date from a prior year (for example, if the dependent is enrolled in the health insurance plan under the employee and has been enrolled for a long period of time, enter **01/01/yyyy** for the current calendar year being reported in the ACA Enrollment Date field and then leave the ACA Withdrawal Date field <u>blank</u>).

m. In the ACA Enrollment Date field (column), enter the date in which the dependent enrolled in the health coverage. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

n. In the ACA Withdrawal Date field (column), enter the date in which the dependent withdrew from the health coverage, if applicable. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

o. Click the **Save** button.

Tip: If needed, to remove a dependent, click the **Delete** button to the left of the desired record; when prompted, click **Yes** to delete the record.

3. All the benefits for which the employee has listed on the Benefits tab (screen) appear in the Dependent Benefits section (if needed, change the filters to modify the benefits displayed here). If desired, complete the Dependent Benefits section to track the benefits of the employee for which the dependent is enrolled (covered). For each benefit for which the dependent is enrolled, complete the following:

   a. Select the box for the Active field to stipulate the dependent is enrolled in the benefit. A checkmark will appear in the box if the field is selected.

   b. The Benefit Description, Benefit Level Description, Dependent Age Limit, Student Age Limit, Enrollment Date, and Withdrawal Date fields appear for the benefit showing the information as defined in the Benefits File or on the Benefits screen (tab) in the Employee File for this employee. The information <u>cannot</u> be changed on this screen.

   Note: The Dependent Age Limit and Student Age Limit fields are displayed for informational purposes only, as the system does <u>not</u> prevent a benefit from being selected for a dependent even if the dependent is beyond the maximum age shown here, or if the dependent is <u>not</u> a student (for the Student Age Limit field only). However, the system does calculate when a benefit will expire for a dependent (calculates the Dependent Benefit Expiration Date) based on their age, whether or <u>not</u> they are a student, whether or <u>not</u> the benefits expire for the dependent, and the age limits set for the benefit for these two fields; the Dependent Benefit Expiration Date is found within the Select Email Criteria option and available on the Dependent Benefit Expiration Date Report.

   c. If desired, enter the date the dependent enrolled in the benefit, or the date the benefit enrollment became effective for the dependent, in the Dependent Enrollment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   d. If applicable, enter the date the dependent withdrew from enrollment of the benefit, or the date the benefit coverage ended for the benefit, in the Dependent Withdrawal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   e. Click the **Save** button.

4. If applicable, repeat Steps 2-3 until all the dependents have been added for the specified employee.

5. Continue adding the remaining information for the employee if needed.

Education Screen (Employees)

Completing the Education Screen in the Employee File:

Note: The Education screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Education** tab.

2. To add a degree for the employee, complete the Education History Information section by entering the following:

   Note: For those school districts with the Negotiations module <u>and</u> utilizing the Negotiation Lanes option in Human Resources, a degree should <u>only</u> be added in the Employee File once the employee has obtained the degree.

   a. Enter the ID of the school from where the degree was obtained by the employee in the School ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.

   b. Enter the ID of the course type describing the major for the employee's degree in the Major Course Type ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

   c. If applicable, enter the ID of the course type describing the minor for the employee's degree in the Minor Course Type ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

   d. Enter the type of degree (such as High School Diploma, Bachelor of Arts, Bachelor of Science, or Master of Education) obtained by the employee in the Degree field, or click the **down-arrow** button to select the correct one.

   e. If desired, enter the date the employee enrolled in the school in the Enrollment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   f. If desired, enter the date the employee graduated from the school in the Graduation Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram A

g. If desired, enter the number of credits the employee completed at the school for the degree in the Credits field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

h. If desired, enter the grade point average the employee earned at the school for the degree in the Grade Point Average field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

i. If desired, enter any additional information to track for the employee's degree in the Comments field. The comment can be up to **1,000** characters long.

j. Click the **Save** button.

3. If applicable, complete the Continuing Education Information section for each course the employee has completed or is currently enrolled by entering the following:

a. Enter the ID of the school where the employee completed the course or is currently enrolled in the course in the School ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

b. Enter the ID of the course the employee completed or is currently enrolled in the Course ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

c. If desired, enter the date the employee enrolled in the course in the Enrollment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

d. If desired, enter the date the employee completed the course in the Completion Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

e. If desired, enter the number of credits the employee completed for the course in the Credits field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

Note: For those school districts with the Negotiations module <u>and</u> utilizing the Negotiation Lanes option in Human Resources, be sure to complete the Credits field in order to include the applicable credit hours associated with the particular course in the total of additional credit hours when placing the employee in the appropriate lane on a particular negotiation package (when calculating the FTE - Hours table).

f. If a course was taken in order to obtain a degree (which appears in the Education History Information List above), enter the corresponding degree in the Degree field. If desired, click the **down-arrow** button to select the correct degree, or press the **Ctrl+F** keys to access the search feature.

Note: For those school districts with the Negotiations module <u>and</u> utilizing the Negotiation Lanes option in Human Resources, only complete the Degree field for a course once the employee has obtained the degree for which the course was being taken. By completing the Degree field, the credit hours associated with the particular course will <u>not</u> be included in the total of additional credit hours when placing the employee in the appropriate lane on a particular negotiation package (when calculating the FTE - Hours table).

g. **For those school districts with the Negotiations module <u>and</u> utilizing the Negotiation Lanes option in Human Resources,** select the Count Toward Education Level field in order to include the credit hours associated with the particular course in the total of additional credit hours when placing the employee in the appropriate lane on a particular negotiation package (when calculating the FTE - Hours table). A checkmark will appear in the box if the field is selected. **For all other school districts**, leave this field unselected.

h. If desired, enter the grade the employee earned for the course in the Course Grade field.

i. Click the **Save** button.

Note: The total of the credits entered for the employee, and the total credits that are defined to count towards the employee's education level and are <u>not</u> tied to a degree, appear in the status bar at the bottom of the Continuing Education Information List.

4. *The Continuing Education Payments section will only appear if a course was entered and saved under the Continuing Education Information section.* If desired, complete the Continuing Education Payments section to track the payments made for a specific course for the employee. For each payment, enter the following:

    a.   Enter the date the payment was made in the Payment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    b.   Enter the amount of the payment for the course in the Payment Amount field.

    c.   If desired, enter any additional information to track for the payment of the course in the Comments field. The comment can be up to **1,000** characters long.

    d.   Click the **Save** button.

5.   If applicable, repeat Steps 2-4 until all the educational information has been added for the specified employee.

6.   Continue adding the remaining information for the employee if needed.

Emergency Contacts Screen (Employees)

Completing the Emergency Contacts Screen in the Employee File:

1. From within the Employee File, click the **Emergency Contacts** tab. See **Diagram A**.

2. If desired, complete the Medical Information section for the employee as follows:

   - If the employee has any allergies, enter a description of the allergies in the Allergies field. The description can be up to **100** characters long.

   - Enter the blood type of the employee in the Blood Type field, or click the **down-arrow** button to select the correct one.

   - If the employee has a medical condition, enter a description of the condition in the Medical Conditions field. The description can be up to **100** characters long.

   - Enter any additional medical information to track for the employee in the Comments field, if desired. The comment can be alphanumeric and up to **1,000** characters long.

3. If desired, complete the Emergency Contacts List with the person(s) to be contacted for the employee in case of an emergency. To add an emergency contact, complete the following:

   - In the blank line (indicated with an asterisk) at the bottom of the Emergency Contacts List, enter the number (**1-10**) for the order in which the person should be contacted in the Contact Order field, or click the **down-arrow** button to select the correct one. The same number can be entered as the order for multiple contacts if the people are to be contacted at the same time; contacts with the same order number will be listed in alphabetical order by name.

   - Enter the name of the person to be contacted in the Person field. The name can be up to **100** characters long.

   - In the Relationship field, enter the relationship between the employee and the emergency contact person (such as Father, Husband, Mother, or Wife), or click the **down-arrow** button to select the correct one.

   - Enter up to two phone numbers for the emergency contact person in the Primary Phone Number and Secondary Phone Number fields. The system will automatically add the dashes for the phone numbers using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.

Diagram A

Note: To remove an emergency contact person, click the **Delete** button to the left of the desired record; when prompted, click **Yes** to delete the record.

4. If desired, enter the medical contacts for the employee in the Medical Contacts List. To add a medical contact, complete the following:

   - In the blank line (indicated with an asterisk) at the bottom of the Medical Contacts List, enter the name of the doctor in the Doctor field. The name can be up to **100** characters long.

   - Enter the phone number for the doctor in the Phone Number field. The system will automatically add the dashes for the phone number using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.

   - Enter any additional information to track for the medical contact in the Comments field, if desired. The comment can be alphanumeric and up to **1,000** characters long.

   Note: To remove a medical contact, click the **Delete** button to the left of the desired record; when prompted, click **Yes** to delete the record.

5. Click the **Save** button.
6. Continue adding the remaining information for the employee if needed.

Employment Screen (Employees)

Completing the Employment Screen in the Employee File:

1. From within the Employee File, click the **Employment** tab.

2. Enter the employee's social security number (**9** digits) in the Social Security Number (Federal ID) field. The system will automatically add the dashes, using the format of ### - ## - ####.

   Note: The Social Security Number (Federal ID) field may <u>not</u> appear or may be locked if your user rights to the Federal ID field were overridden within the User Security option to have no access or read only access.

   Tip: If the social security number entered in this field matches the social security number entered for another employee (or entity), a warning icon will appear to the right of the field; verify the number entered is correct, and if needed, determine if the new record should continue to be added for the employee or if a record already exists.

3. Enter the sex (**Female** or **Male**) of the employee in the Gender field, or click the **down-arrow** button to select the correct one. See **Diagram A**.

4. Enter the employee's date of birth in the Birth Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

5. The age (in years) of the employee is automatically calculated and displayed in the Age field. The age is calculated based on the current date of the computer, and <u>cannot</u> be changed.

6. Enter the actual marital status (**Domestic Partner**, **Married**, **Qualified Domestic Relations Order**, or **Single**) of the employee in the Marital Status field, or click the **down-arrow** button to select the correct one.

7. If desired, enter whether the employee is **Hispanic or Latino** or **Not Hispanic or Latino** in the Ethnicity field, or click the **down-arrow** button to select the correct one.

8. Enter the employee's appropriate legal status for living in this country (**Citizen**, **Non-Resident Alien**, or **Resident Alien**) in the Resident Status field, or click the **down-arrow** button to select the correct status.

Diagram A

9. If desired, enter a number assigned to the employee in the Employee Number field. For example, this may be an ID number assigned by the state to each teacher. The employee number can be alphanumeric and up to **15** characters long.

10. Enter the type of wages that will be used to pay the employee (**Contract** or **Unit**) in the Salary Type field, or click the **down-arrow** button to select the correct one. If the employee will be paid a designated total dollar amount over a specified number of pay periods, enter **Contract**. If the employee will be paid with an hourly or daily rate in which the number of units (hours or days) must be entered for the employee during a pay period, enter **Unit**.

11. If applicable, enter the date the employee became a tenured faculty member in the Tenure Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

12. If desired, enter the title for the job description of the employee in the Position field. The information can be up to **30** characters long.

13. In the EEO-5 Classification field, enter the appropriate category for the employee for inclusion on the EEO-5 Survey report, which is generated biennially. If the exact category is not known, click the **down-arrow** button to select the correct one.

14. Enter the number of years the employee has worked at this school district in the Years of Service (Internal) field. The number can be up to **6** digits (including the decimal point), and will be rounded to **4** decimal places by the system.

15. Enter the number of years the employee has worked at other school districts located in the state in the Years of Service (External in State) field. The number can be up to **6** digits (including the decimal point), and will be rounded to **4** decimal places by the system.

16. Enter the number of years the employee has worked at other school districts located outside of the state in the Years of Service (External Out of State) field. The number can be up to **6** digits (including the decimal point), and will be rounded to **4** decimal places by the system.

17. The total number of years the employee has worked internally, externally in state, and externally out of state is automatically calculated and displayed in the Years of Service (Total) field. The number in the Years of Service (Total) field <u>cannot</u> be changed.

18. Enter the number of times the employee will be paid in the Tax Pay Periods Per Year field. The system uses this information to compute the annual salary when calculating the federal and state income taxes.

19. Enter the ID of the checking account from which the employee will generally be paid in the Checking Account ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. The checking account entered here will be the default checking account for this employee.

20. Enter the ID of the pay group to which the employee belongs in the Pay Group ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. The pay group entered here will be the default pay group for this employee.

21. Leave the Last Paid Date field <u>blank</u> when entering a new employee. The system will automatically track this information after updating a calculate payroll batch in which the employee was paid (from earnings or deductions) and display the Check Date from the batch in this field.

22. Leave the Last Worked Date field <u>blank</u> when entering a new employee. The system will automatically track this information after updating a calculate payroll batch in which the employee had earnings and display the Last Worked Date from the batch in this field

23. Leave the Last SSNVS Date field <u>blank</u> when entering a new employee. This field will be updated as part of the steps to complete the SSN Verification Service option.

24. If applicable, enter the reason for termination (such as Resignation or Retirement) in the Termination Reason field, or click the **down-arrow** button to select the correct one.

25. If desired, in the Races field, specify the nationality of the employee by selecting the applicable race(s). To select a race, click the box for the Selected column to the left of the desired race. A checkmark will appear in the box if the race is selected.

26. Complete the Employee Dates List with the applicable dates for the employee. To add a date, complete the following:
    a) In the blank line (indicated with an asterisk) at the bottom of the Employee Dates List, enter the appropriate date in the Date Value field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

b) Then enter the type for the date being tracked (**Hire/Rehire Date**, **Probation Date**, **Termination Date**, or **Other Date**) in the Date Type field, or click the **down-arrow** button to select the correct one.

   Note: If an employee leaves and then is later rehired by the school district, enter a second entry with Hire/Rehire Date as the Date Type, so the initial Hire/Rehire Date will be listed, followed by the Termination Date, and then a second Hire/Rehire Date; the Hire/Rehire Date with the most recent date would be considered the rehire date.

c) If **Hire/Rehire Date** is specified as the Date Type and the date is after a Termination Date that is entered for the employee, the Weeks Since Prior Termination Date field will automatically be updated upon saving to reflect the number of weeks between the newly entered Hire/Rehire Date and the prior Termination Date. The Weeks Since Prior Termination Date field cannot be changed.

   Note: The Weeks Since Prior Termination Date field will be blank for entries with a Date Type of Probation Date, Termination Date, or Other Date.

d) The Track as ACA New Hire field is enabled if **Hire/Rehire Date** is specified as the Date Type. If applicable, select the Track as ACA New Hire field for a Hire/Rehire Date to have the employee reflected as a new hire in the Affordable Care Act (ACA) Hours Tracking option and also on the ACA Hours screen (tab) in the Employee File for the corresponding measurement period. A checkmark will appear in the box if the field is selected. By default, this field will be selected.

   Note: An employee will automatically be included as an ongoing employee in measurement periods that begin after the first Hire/Rehire Date and before the last Termination Date.

   Tip: As defined within the Affordable Care Act guidelines, if an employee has had no hours of service credited for at least 26 consecutive weeks for educational organizations (or 13 weeks for non-educational organizations), the employee may be considered a new hire (rehire) for purposes of the Affordable Care Act. Additionally, under a rule of parity within the Affordable Care Act guidelines, an employee may be considered a new hire (rehire) if the employee has had no hours of service during a period that is at least 4 consecutive weeks, but less than 26 weeks for educational organizations (or 13 weeks for non-educational organizations), and is longer than the employee's preceding period of employment (for example, if an employee works for 3 weeks, terminates, and then 10 weeks later is rehired, the employee can be treated as a new hire (rehire) because the 10-week break is more than 4 weeks, less than 26 weeks (for educational organizations; 13 weeks, for non-educational organizations), and is longer than the employee's preceding period of employment of 3 weeks). Therefore, if an employee leaves and then is rehired after 26 weeks (for educational organizations; 13 weeks for non-educational organizations), select the Track as ACA New Hire field for the rehire date, if desired, and if an employee leaves and then is rehired within 26 weeks (for educational organizations; 13 weeks for non-educational organizations), do not select the Track as ACA New Hire field for the rehire date unless the rule of parity applies.

e) If desired, enter any additional information to track for the date in the Comments field. The comment can be up to **1,000** characters long.

   Tip: To remove a date, click the **Delete** button to the left of the desired record; when prompted, click **Yes** to delete the record.

27. All the employee groups defined in the system appear in the Employee Groups List. To include the employee in one or more of the existing employee groups, click the box for the Selected column to the left of each desired Employee Group ID. A checkmark will appear in the box if the employee group is selected.

    Note: The standard employee group defined with an ID of EMPLOYEES is automatically selected for all employees and cannot be changed.

28. Click the **Save** button.

29. Continue adding the remaining information for the employee if needed.

Employment History Screen (Employees)

Completing the Employment History Screen in the Employee File:

Note: The Employment History screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Employment History** tab.

2. For each previous employer being tracked for the employee, complete the following:

   a. Click the **New Record** button.

   b. Enter the ID of the employer in the Employer History ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.

      Note: Only the active employers appear by default when searching, but the filters can be changed if needed.

   c. Enter the ID of the position title the employee held at the previous employer in the Position Title ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

      Note: Only the position titles with a Position Type Usage of External or Both can be entered or selected for this field.

   d. If desired, enter the total number of years the employee worked at the previous employer (position) in the Years of Experience field. The number can be up to **5** digits (including the decimal point) and will be rounded to **2** decimal places by the system.

   e. If desired, enter the date the employee started working at the previous employer in the Hire Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   f. If desired, enter the date the employee quit working at the previous employer in the Termination Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   g. If applicable, enter the date a request for employment verification was sent or made in the Verification Sent Date field, if desired. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

Diagram A

h.   If applicable, enter the date a request for employment verification was received or confirmed in the Verification Received Date field, if desired. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

i.   If desired, enter the salary amount the employee earned when starting at the previous employer in the Starting Salary field. The amount can be up to **14** digits (including the decimal point) and will be rounded to **2** decimal places by the system.

j.   If desired, enter the salary amount the employee earned before leaving the previous employer in the Ending Salary field. The amount can be up to **14** digits (including the decimal point) and will be rounded to **2** decimal places by the system.

k.   If desired, enter the reason for termination (for example, Resignation or Job Elimination) in the Termination Reason field, or click the **down-arrow** button to select the correct one.

l.   If desired, enter the name of the employee's supervisor at the previous employer in the Supervisor Name field. The name can be up to **100** characters long.

m.   If desired, enter the schedule the employee worked (for example, full-time, part-time, 8 to 5 M-F, etc.) at the previous employer in the Work Schedule field. The schedule can be alphanumeric and up to **100** characters long.

n.   If desired, enter the specific duties and responsibilities the employee had at the previous employer in the Responsibilities field. The responsibilities can be up to **1,000** characters long.

o.   If desired, enter any additional information to track for the previous employer in the Comments field. The comment can be up to **1,000** characters long.

p.   Click the **Save** button.

3.   If applicable, repeat Step 2 until all the previous employers have been added for the specified employee.

4.   Continue adding the remaining information for the employee if needed.

FMLA Screen (Employees)

Completing the FMLA Screen in the Employee File:
Note: The FMLA screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **FMLA** tab.

2. All the family or medical leaves currently tracked (entered) for the employee appear in the FMLA Leaves List. To view (and edit or delete) an entry, double-click on the desired record, or to add a new FMLA leave record for the employee, complete Steps 3-6 below.

   Tip: For organizations that have licensed the Web Link and Human Resources modules and have the system set up to use FMLA leave requests (the Allow FMLA Leave Requests field is selected on the FMLA tab within the Leave Request Options option), the approved FMLA leave requests that have <u>not</u> yet been added to the FMLA screen, in addition to the FMLA leave requests pending approval, for the employee appear in the FMLA Leave Request Entries List. The approved FMLA leave requests can be added as a new FMLA leave record or added to existing FMLA leave records as needed. The FMLA Leave Request Entries List only appears if there are approved FMLA leave requests that have <u>not</u> yet been added, or FMLA leave requests pending approval, for the employee.

3. To add a new family or medical leave for the employee, complete the following:

   a. Click the **New Record** button. See **Diagram A**.

   b. Enter the date the initial request was made for the leave by the employee in the Initial Requested Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   c. Enter the reason for the leave (for example, Birth of a Child, Care of a Family Member, etc.) in the FMLA Reason field, or click the **down-arrow** button to select the correct one.

   d. If the leave is tied to a workers' compensation claim (as entered on the Work Comp screen in the Employee File for the particular employee), enter the appropriate claim number for the workers' compensation claim for this leave in the Workers' Compensation Claim Number field, or click the **down-arrow** button to select the correct one.

   e. If applicable, enter the ID of the employee who initially approved the leave request in the Initial Approver ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

Diagram A

f. If applicable, enter the date the leave was initially approved in the Initial Approval Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

g. If desired, enter any additional information to track for the leave in the Comments field. The comment can be up to **1,000** characters long.

h. If desired, enter the date the verbal or written notice for the leave request was received from the employee in the FMLA Notice Received Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

i. If desired, enter the date the written notice for the response to the request from the employer was given to the employee in the FMLA Notice Sent Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

j. If applicable, enter the date the medical certification was received from the employee in the Medical Certification Received Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

k. If applicable, enter the date the leave was denied in the Denial Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

l. Click the **Save** button.

4. Complete the FMLA Leave Details section to track when the employee will be (or was) absent while on the specified leave. For each period of time, enter the following:

a. Enter the date the leave will start (or started) in the Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

b. If desired, enter the starting time for when the employee will be (or was) absent on the specified date in the Start Time field. Use the **hh:mm AMPM** format (or **hh:mm** if military time is used). This field is disabled if the All Day field is selected.

   Note: The colon does not have to be entered between the hour and the minutes; for example, enter 8 o'clock as **800** or **0800**. Also, the AM or PM does not have to be entered; if using regular time (not military time), the hours from 7:00 to 11:59 will default to AM while the other hours will default to PM, or for organizations that have licensed the Web Link module, the hours specified in the AM Range field in the Leave Request Options option will default to AM while the other hours will default to PM. After advancing from the field, the time will be formatted to regular time (for example, if **1400** (or **14:00**) is entered, the system will convert it to **2:00 PM**), or for organizations that have licensed the Web Link module, the time will be formatted to regular or military time as specified in the Time Display field in the Leave Request Options option.

c. If known, enter the date the leave will end (or ended) in the FMLA End Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   Note: The date entered in the End Date field must be on or after the date entered in the Start Date field.

d. If desired, enter the ending time for when the employee will be (or was) absent on the specified date in the End Time field. Use the **hh:mm AMPM** format (or **hh:mm** if military time is used). This field is disabled if the All Day field is selected.

   Note: The colon does not have to be entered between the hour and the minutes; for example, enter 8 o'clock as **800** or **0800**. Also, the AM or PM does not have to be entered; if using regular time (not military time), the system will default to use AM or PM based on the nearest one within a 12-hour period from the specified Start Time. After advancing from the field, the time will be formatted to regular time (for example, if **1400** (or **14:00**) is entered, the system will convert it to **2:00 PM**), or for organizations that have licensed the Web Link module, the time will be formatted to regular or military time as specified in the Time Display field in the Leave Request Options option.

e. If the employee will be (or was) absent for the full day on the specified date(s), select the All Day field. A checkmark will appear in the box if the field is selected.

f. If desired, enter the total number of hours the employee was absent during the specified period in the Number of Hours field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

g. If desired, enter the total number of days the employee was absent during the specified period in the Number of Days field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

h. If desired, enter the ID of the leave the employee will use (or used) while on leave in the Leave ID field, or click the **down-arrow** button to select the correct one. Only active leaves set up for the employee can be entered here.

Tip: If this field is completed, it will <u>not</u> affect the balances for the specified leave; if needed, the appropriate absence entries would need to be manually entered in Employee Absences or Pay Period Entries to be processed as part of a Payroll calculation.

i. If desired, enter the number of units of leave the employee will use (or used) in the Units field. The number entered here must be a positive number, and can be up to **14** digits long (including the decimal point and comma(s) if applicable) and will be rounded to **4** decimal places by the system if capable.

Tip: If this field is completed, it will <u>not</u> affect the balances for leave; if needed, the appropriate absence entries would need to be manually entered in Employee Absences or Pay Period Entries to be processed as part of a Payroll calculation.

j. The Leave Request field is disabled and <u>cannot</u> be changed. A checkmark appears in the Leave Request field for entries created from processing an approved FMLA leave request.

k. The Requested Date field is disabled and <u>cannot</u> be changed. The date an FMLA leave request was submitted appears in the Requested Date field for entries created from processing an approved FMLA leave request.

l. The Cancelled field is disabled and <u>cannot</u> be changed. A checkmark appears in the Cancelled field for entries created from processing an approved FMLA leave request that has since been cancelled.

Note: If an entry with the Cancelled field selected is deleted from the FMLA Leave Details List, it will <u>not</u> show as an unprocessed FMLA leave request entry.

m. Click the **Save** button.

5. If desired, complete the Payments section to track any payments made by the employee, such as for benefits, while on the specified leave. For each payment, enter the following:

a. Enter the date the payment was made in the Payment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

b. Enter the amount of the payment in the Payment Amount field. The amount can be up to **14** digits (including the decimal point) and will be rounded to **2** decimal places by the system.

c. If desired, enter any additional information to track for the payment in the Comments field. The comment can be up to **1,000** characters long.

d. If the payment was made for a specific benefit, enter the ID of the benefit associated with the payment in the Benefit ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

Note: If a benefit is tied to the payment, the payment will also display on the Benefits screen in the Employee File (in Human Resources) for the specified benefit.

e. Click the **Save** button.

6. If applicable, repeat Steps 3-5 until all the leaves and/or payments have been added for the specified employee.

7. Continue adding the remaining information for the employee if needed.

Military Service Screen (Employees)

Completing the Military Service Screen in the Employee File:

Note: The Military Service screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Military Service** tab.
2. For each military service completed by the employee, complete the following:
    a. Enter the branch of military (for example, Air Force, Army, Navy, etc.) in which the service was completed by the employee in the Military Branch field, or click the **down-arrow** button to select the correct one. See **Diagram A**.
    b. If applicable, enter the war for which the employee is a veteran in the War Veteran field, or click the **down-arrow** button to select the correct one.
    c. If desired, enter the date the employee enlisted in the particular branch of military in the Enlisted Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
    d. If desired, enter the date the employee was discharged from the particular branch of military in the Discharged Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
    e. If desired, enter the employee's rank in the particular branch of military in the Rank field. The rank can be alphanumeric and up to **50** characters long.
    f. If desired, enter the employee's specialty while on duty in the Specialty field. The specialty can be alphanumeric and up to **50** characters long.
    g. Click the **Save** button.
3. If applicable, repeat Step 2 until all the military service information has been added for the specified employee.
4. Continue adding the remaining information for the employee if needed.

Diagram A

Positions Screen (Employees)

Completing the Positions Screen in the Employee File:

Note: The Positions screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Positions** tab.
2. To add a position for the employee, complete the Positions section by entering the following:
   a. In the Position Title Description field, click the **down-arrow** button or press the **Ctrl+F** keys to select the position for which the employee holds. See **Diagram A**.

      Tip: When searching in the Position Title Description field, all the active positions appear by default; if desired, to view only the positions that are currently open (vacant) within the school district, change the filters so only the positions with a blank Position Start Date appear (to do this, click the **Filter** button for the Position Start Date field (column) when searching and select **(Blanks)**).

   b. Once the position is selected, the description for the corresponding position type and position will appear in the Position Type Description and Position Description fields. The information in these fields cannot be changed on this screen.

   c. Enter the ID of the evaluation type used for the employee in the specified position in the Evaluation Type ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. The evaluation type as entered for the particular position title in the Position Titles File will appear as the default, but can be changed if needed.

   d. Enter the FTE for the particular employee for the specified position in the Position Employee FTE Value field, if desired. The number can be up to **6** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable. The FTE for the position will appear as the default, but can be changed if needed.

      Note: If the position is split amongst two or more employees who are sharing the job, enter only the FTE for the particular employee here.

   e. Enter the date when the employee started working in the specified position in the Position Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

   f. Leave the Position End Date field blank when adding an employee who is currently in the specified position.

      Note: Only complete the Position End Date field if the employee is no longer working in the specified position or the employee will stop working in the position on a certain date in the near future (as will indicate the position is open and waiting to be filled). If entering an end date, use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

Diagram A

    g.   The number of years the employee has held the position is automatically calculated and displayed in the Years in Position field. The number of years is calculated based on the Position Start Date for the employee and the current date of the computer (or the Position End Date if the employee is no longer in the position), and <u>cannot</u> be changed.

    h.   The corresponding information (as defined from within the Positions File) for the selected position will appear in the Site ID, Building ID, Department ID, Office Phone Number, Extension, and Cell Phone Number fields. The information in these fields <u>cannot</u> be changed on this screen.

    i.   Click the **Save** button.

3.   If desired, complete the Evaluations section for each position for the employee by entering the following:

    a.   Enter the date the evaluation was completed or conducted in the Evaluation Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

    b.   Enter the ID of the employee who completed or conducted the evaluation in the Evaluator ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    c.   If desired, enter the ID of the evaluation type used for the evaluation in the Evaluation Type ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. If applicable, the evaluation type as specified for the employee's position (above) will appear as the default, but can be changed if needed.

    d.   If desired, enter the ID of the evaluation rating given as the overall performance rating during the evaluation in the Evaluation Rating ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

    e.   If desired, enter any additional information or specific comments made during the evaluation by the evaluator in the Evaluator Comments field. The comment can be up to **1,000** characters long.

    f.   If desired, enter any additional information or specific comments made during the evaluation by the employee in the Employee Comments field. The comment can be up to **1,000** characters long.

    g.   Click the **Save** button.

4.   If applicable, repeat Steps 2-3 until all the applicable positions and/or evaluations have been added for the specified employee.

5.   Continue adding the remaining information for the employee if needed.

Trainings Screen (Employees)

Completing the Trainings Screen in the Employee File:
Note: The Trainings screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Trainings** tab.

2. For each training completed by the employee or each training for which the employee is registered to attend, complete the following:

    a. Click the **New Record** button. See **Diagram A**.

    b. In the Training Event Description field, click the **down-arrow** button or press the **Ctrl+F** keys to select the training event for which the employee completed or is registered to attend.

    Note: All the training events appear by default when searching (including those that have previously been held or cancelled), but the filters can be changed if needed.

    c. Select the Training Event Attended field to indicate the employee attended the training event. A checkmark will appear in the box if the field is selected. When adding the employee to a training event for registration purposes (has <u>not</u> yet completed the training), leave the Training Event Attended field unselected; once the training event has been completed, the field can be selected for the employee at that time.

    d. For *external* trainings only, enter the total number of miles to and from the training event for the employee in the Mileage field, if desired

    e. For *external* trainings only, complete the applicable Expense fields to track the cost to attend the training event for the employee, if desired. The expenses that can be tracked for a training event are: Air Transportation Expense, Ground Transportation Expense, Lodging Expense, Food Expense, Event Fee Expense, and Miscellaneous Expense.

    f. If desired, enter any additional information to track for the employee for this training event in the Comments field. The comment can be up to **1,000** characters long.

    g. Click the **Save** button.

3. If applicable, repeat Step 2 until all the applicable trainings have been added for the specified employee.

4. Continue adding the remaining information for the employee if needed.

Diagram A

Work Comp Screen (Employees)

Completing the Work Comp Screen:
Note: The Work Comp screen is only available in the Employee File if the school district has the Human Resources module.

1. From within the Employee File, click the **Work Comp** tab.
2. To add an incident of an injury for the employee, complete the following:
   a. Click the **New Record** button. See **Diagram A**.
   b. Enter the date when the injury happened in the Injury Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.
   c. Enter the time when the injury happened in the Injury Time field. Use the **hh:mm am/pm** format.

   Note: The system will automatically add "AM" or "PM" to the time if it is <u>not</u> specified, but verify it is correct.

   d. Enter the description of all the body parts that were injured in the Body Parts Injured field. The description can be up to **1,000** characters long.

Diagram A

   e. Enter a detailed description of how the injury happened in the Injury Description field. The description can be up to **1,000** characters long.
   f. Enter the ID of the site where the injury happened in the Site ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
   g. Enter the ID of the building where the injury happened in the Building ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
   h. Enter the ID of the room where the injury happened in the Room ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
   i. If the injury happened when the employee was working offsite, enter the description where the employee was located at the time of the injury in the Offsite Location field. The description can be up to **1,000** characters long.
   j. If applicable, enter the name of the person who witnessed the incident in the Witness Name field. The name can be up to **100** characters long.
   k. If applicable, enter the phone number for the witness in the Witness Phone Number field. The system will automatically add the dashes for the phone number using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.
   l. If desired, enter any additional information to track for the injury in the Comments field. The comment can be up to **1,000** characters long.
   m. Click the **Save** button.

3. If the employee missed work due to the specified injury, complete the Lost Work Information section by entering the following:

   a. If desired, enter the date the employee first missed work due to the injury in the Lost Work Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date. See **Diagram B**.

   b. If desired, enter the date for the last day the employee missed work due to the injury in the Lost Work End Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

Lost Work Information			
Lost Work Start Date	Lost Work End Date	Number of Days Lost	Comments
01/13/2016	02/12/2016	20.00	

Enter the number of days that were lost here; the system does <u>not</u> calculate the number automatically.

Diagram B

   c. If desired, enter the total number of days the employee missed work in the Number of Days Lost field. The number can be up to **14** digits long (including the decimal point) and will be rounded to **4** decimal places by the system if capable.

   d. If desired, enter any additional information to track for the lost work days in the Comments field. The comment can be up to **1,000** characters long.

   e. Click the **Save** button.

4. If a claim was filed for the specified injury with the workers' compensation insurance provider, complete the Claim Information section by entering the following:

   a. Enter the number assigned to the claim in the Claim Number field. The number can be alphanumeric and up to **25** characters long. See **Diagram C**.

   b. Enter the status of the claim (i.e. Open, Closed, Cancelled, etc.) in the Claim Status field, or click the **down-arrow** button to select the correct one. The status of **Open** will appear as the default, but can be changed if needed.

   c. If desired, enter the date the claim was submitted to the workers' compensation insurance provider in the Claim Form Mailed Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

   d. If desired, enter the date the claim was received from the workers' compensation insurance provider in the Claim Form Received Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

   e. If desired, enter the date the status of the claim was officially considered closed (and the Claim Status was changed to **Closed**) in the Claim Closed Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the correct date.

Claim Number	123487-789
Claim Status	Closed
Claim Form Mailed Date	01/15/2008
Claim Form Received Date	01/20/2008
Claim Closed Date	02/14/2008
Claim Cost	1,200.00
Previously Injured	☐
Previous Claim Number	

If this body part was previously injured, select the Previously Injured field and enter or select the number of the previous claim in the Previous Claim Number field.

Diagram C

   f. If desired, enter the total cost of charges for the claim in the Claim Cost field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

   g. If the employee had a previous injury to the same body parts as with this claim, select the Previously Injured field. A checkmark will appear in the box if the field is selected.

   h. If the employee had a previous workers' compensation claim and it is tied to this claim, enter the number of the previous claim in the Previous Claim Number field, or click the **down-arrow** button to select the correct one.

   i. Click the **Save** button.

5. If the employee completed treatments for the specified injury, complete the Treatments section by entering the following:

   a. Enter the name of the physician that treated the employee's injury in the Physician Name field. The name can be up to **100** characters long. See **Diagram D**.

   b. If desired, enter the name of the clinic where the employee received the treatment in the Clinic Name field. The name can be up to **100** characters long.

Treatments					
	Physician Name	Clinic Name	Clinic Address	Clinic Phone Number	Onsite Treatment
▶ ✖	Dr. Bill Anderson	Anywhere Specialty Clinic	1254 S. Hawthrone	641-3178	☐
✳ ✖					☑

If desired, track the physician and clinic where the employee received treatment in the Treatments section.

Diagram D

    c. If desired, enter the address of the clinic in the Clinic Address field. The address can be up to **100** characters long.

    d. If desired, enter the phone number of the clinic in the Clinic Phone Number field. The system will automatically add the dashes for the phone number using the following formats: 1) ### - #### if 7 digits are entered, 2) ### - #### x ## if 8 or 9 digits are entered, 3) ### - ### - #### if 10 digits are entered, and 4) ### - ### - #### x ## if 11 or more digits are entered.

    e. If the employee's injury was treated at the scene where the injury happened, select the Onsite Treatment field. A checkmark will appear in the box if the field is selected.

    f. Click the **Save** button.

6. If desired, complete the Payments section to track any payments made on the claim. For each payment, enter the following:

    a. If desired, in the Payment type field, enter the type of the payment made: **Claim** or **Wages**; or click the **down-arrow** button to select the correct one. If the payment was on the claim, enter **Claim**. If the payment was made specifically for only wages to the employee, enter **Wages**. See **Diagram E**.

Payments			
Payment Type	Payment Date	Payment Amount	Comments
Claim	01/27/2015	400.00	
Claim	02/03/2015	400.00	
Claim	02/10/2015	400.00	
		1,200.00	

In the example, payments were made on the claim.

Diagram E

    b. Enter the date the payment was made in the Payment Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    c. Enter the amount of the payment in the Payment Amount field. The amount can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system.

    d. If desired, enter any additional information to track for the payment in the Comments field. The comment can be up to **1,000** characters long.

    e. Click the **Save** button.

7. If applicable, repeat Steps 2-6 until all the workers' compensation information has been added for the specified employee.

8. Continue adding the remaining information for the employee if needed.

MISCELLANEOUS

Checklists

Checklists is an option available in Human Resources and allows a list of tasks for various activities or processes to be created and used to ensure that each step on the list is completed (for example, New Hire Checklist). Once a checklist has been created within the Checklist File, a checklist instance is setup (within the Checklist Instances option) for the defined checklist and tied to a designated employee, if applicable.

Adding a Checklist:
1. From the Human Resources screen, select the **Maintenance** menu and then **Checklists**.
2. At the Checklists screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the checklist in the Checklist ID field. The ID can be alphanumeric and up to **10** characters long (no spaces). See **Diagram A**.

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

Diagram A

4. Enter the description for the checklist in the Checklist Description field. The description can be up to **40** characters long.
5. Select the Active field to stipulate the checklist is currently used at the school district. A checkmark will appear in the box if the field is selected. When adding a new checklist, the Active field is selected by default.
6. To add a task to the specified checklist, complete the following:
   a. In the blank line (indicated with an asterisk) at the bottom of the Checklists Tasks List, enter the sequence number for what order to have the task listed on the checklist in the Checklist Task Sequence field. The sequence number can be up to **2** digits long (**1-99**). For example, if this task should be listed first on the checklist, enter **1** as the sequence number; if it should be listed second, enter **2**. The same sequence number can be entered for multiple tasks if the tasks are to be completed at the same time; tasks with the same sequence number will be listed in alphabetical order by the description.
   b. Enter the description for the task in the Checklist Task Description field. The description can be up to **40** characters long.

c. If applicable, enter the ID of the user who is responsible for completing the task in the Responsible User ID field; otherwise, leave the field <u>blank</u>. If the ID is not known, click the **down-arrow** button to select the correct one.

d. Select the Display Notification field to have the Display Notification field selected by default for the task on a checklist instance created using this checklist (the default can be changed when creating a checklist instance, if needed). If the Display Notification field is selected for a task on a checklist instance, an alert appears on the Human Resources screen for the designated user (or all users with rights to Human Resources if the Responsible User ID field is <u>not</u> completed) if the task is pending completion. A checkmark will appear in the box if the field is selected.

e. If the Responsible User ID field is completed, the Email Notification field is enabled. If applicable, select the Email Notification field to have the Email Notification field selected by default for the task on a checklist instance created using this checklist (the default can be changed when creating a checklist instance, if needed). If the Email Notification field is selected for a task on a checklist instance, an email will be sent to the designated user specified in the Responsible User ID field as a reminder the task is pending completion. A checkmark will appear in the box if the field is selected.

   Tip: An email is sent for the task with the lowest checklist task sequence (with the Email Notification field selected) when initially creating (saving) the checklist instance, and then an email is sent for the task with the next checklist task sequence (with the Email Notification field selected) after that as the Task Status field is updated to **Closed** or **Cancelled** for a task and the checklist instance is saved.

   <u>*Note*</u>: In order to send notification emails to the user specified in the Responsible User ID field, complete the following: 1) complete the General Options tab in the Email Manager option (if <u>not</u> already completed) by selecting the Enable Email Manager field and completing the remaining fields; 2) if needed, on the Email Addresses tab in the Email Manager option, add an email address to use when emailing notifications for Human Resources; 3) complete the Notification Options section on the Human Resources tab in the Email Manager option; and 4) verify the employee tied to the user specified in the Responsible User ID field has an email address entered in the Employee File with the Other Communication field selected. The notification emails sent for the tasks on checklist instances use the verbiage as defined within the program and it <u>cannot</u> be changed.

f. Select the Active field to allow the task to be used in a checklist instance. A checkmark will appear in the box if the field is selected. When adding a new task, the Active field is selected by default.

   Note: If the Active field is unselected for a checklist task, the task will be omitted when a checklist instance is created for the specified checklist.

g. Repeat these steps until all the tasks have been added for the specified checklist.

7. Click the **Save** button.

Changing a Checklist:
1. From the Human Resources screen, select the **Maintenance** menu and then **Checklists**.
2. At the Checklists screen, enter the ID of the checklist to change in the Checklist ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
3. Make the desired changes to the checklist.
   a. To add a task to the checklist, complete the blank line (indicated with an asterisk) at the bottom of the Checklist Tasks List.
   b. To remove a task from the checklist, click the **Delete** button located to the left of the desired task in the Checklist Tasks List; when prompted to delete the record, click **Yes**.

      Note: If a checklist task is being used in a checklist instance, the system will <u>not</u> allow it to be deleted; however, the task can be made inactive by removing the checkmark for the Active field (located in the last column) to omit the task when creating new checklist instances for the specified checklist.
4. If the Active field for the checklist was unselected (the checkmark was removed) so the checklist is now inactive, a prompt will appear asking to make the checklist tasks on the checklist inactive as well; click **Yes** to inactivate the checklist tasks also and then click the **Save** button.
5. If the Active field for the checklist was selected (a checkmark appears in the box) so the checklist is now active, a prompt will appear asking to make the checklist tasks on the checklist active as well; click **Yes** to activate the checklist tasks also and then click the **Save** button.
6. After all the changes have been made, click the **Save** button.

7. If the ID for the checklist was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the checklist, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new checklist with the specified ID that is a duplicate of the current checklist, click the **Create New** button.

8. If a new task was added to the checklist, a prompt will appear asking to update any open checklist instances with the new task(s); click **Yes** to add the new task(s) to the applicable open checklist instances (those tied to the particular checklist including one or more tasks with **Open** as the Task Status), or else click **No** to only utilize the new task with future checklist instances (any open checklist instances tied to the particular checklist would remain as is).

<u>Deleting a Checklist:</u>
<u>Note</u>: If a checklist is being used in a checklist instance, the system will <u>not</u> allow it to be deleted; however, the checklist (and all the checklist tasks, if desired) can be made inactive by removing the checkmark for the Active field (located under the Checklist Description field). To delete just one checklist task from a particular checklist, follow the instructions for changing a checklist.

1. From the Human Resources screen, select the **Maintenance** menu and then **Checklists**.

2. At the Checklists screen, enter the ID of the checklist to delete in the Checklist ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the checklist to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Checklist Instances

Checklist Instances is an option available in Human Resources and is used to create a specific occurrence (and tie to a designated employee, if applicable) for a checklist in order to track the progress for the activity or process. For example, a checklist instance can be created for a new hire checklist for a newly hired employee to ensure each step on the new hire checklist is completed for the employee. As each step is completed, the user who completed the task updates the status of the task on the checklist to "Closed", while the system tracks the user who closed the task and the date it was done.

Email messages can be sent for the steps on a checklist instance as a reminder for users to complete the applicable tasks.

Adding a Checklist Instance:
1. From the Human Resources screen, select the **Options** menu and then **Checklist Instances**.
2. At the Checklist Instances screen, click the **New Record** button.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a unique description for the checklist instance in the Checklist Instance Description field. The description can be up to **40** characters long (no spaces). Leave the field <u>blank</u> to use a default description assigned by the system. See **Diagram A**.
4. Enter the ID of the checklist to use with the checklist instance in the Checklist ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
5. If applicable, enter the ID of the employee for whom the checklist instance is being created in the Employee ID field; otherwise, leave the field <u>blank</u>. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

   Note: If desired, click the **Go To** button located to the right of the Employee ID field to open the specified employee's record in the Employee File.
6. If desired, enter any additional information for the checklist instance in the Comments field. The comment can be up to **1,000** characters long.
7. All the active tasks defined for the specified checklist will appear in the Checklist Instance Tasks List. If needed, edit the tasks in the Checklist Instance Tasks List as follows:
   a. The status for each task defaults to **Open**, and can be changed to **Closed** as each step is completed (or changed to **Cancelled** if the task will <u>not</u> be completed for the particular checklist instance).

Diagram A

b. If desired, enter the date a task should be completed by in the Due Date field. Use the **mm/dd/ yyyy** format or click the **down-arrow** button to select the desired date.

c. Select the Display Notification field for the task to have an alert appear on the Human Resources screen for the designated user (or all users with rights to Human Resources if the Responsible User ID field is <u>not</u> completed) if the task is pending completion. A checkmark will appear in the box if the field is selected. The Display Notification field will be selected by default for a task if the Display Notification field is selected for the task on the applicable checklist (within the Checklists option).

d. If the Responsible User ID field is completed, the Email Notification field is enabled. If applicable, select the Email Notification field to send an email to the designated user specified in the Responsible User ID field as a reminder the task is pending completion. A checkmark will appear in the box if the field is selected. The Email Notification field will be selected by default for a task if the Email Notification field is selected for the task on the applicable checklist (within the Checklists option).

Tip: An email is sent for the task with the lowest checklist task sequence (with the Email Notification field selected) when initially creating (saving) the checklist instance, and then an email is sent for the task with the next checklist task sequence (with the Email Notification field selected) after that as the Task Status field is updated to **Closed** or **Cancelled** for a task and the checklist instance is saved.

Note: In order to send notification emails to the user specified in the Responsible User ID field, complete the following: 1) complete the General Options tab in the Email Manager option (if <u>not</u> already completed) by selecting the Enable Email Manager field and completing the remaining fields; 2) if needed, on the Email Addresses tab in the Email Manager option, add an email address to use when emailing notifications for Human Resources; 3) complete the Notification Options section on the Human Resources tab in the Email Manager option; and 4) verify the employee tied to the user specified in the Responsible User ID field has an email address entered in the Employee File with the Other Communication field selected. The notification emails sent for the tasks on checklist instances use the verbiage as defined within the program and it <u>cannot</u> be changed.

e. The system tracks the user who closed (or cancelled) each task in the Changed by User ID field and the date it was completed in the Changed Date field. Initially, when the checklist instance is first created, the Changed by User ID and Change Date fields will be <u>blank</u>; but after a checklist instance is saved, when additional changes are made to a task, the Changed by User ID and Changed Date fields are updated.

8. Click the **Save** button.

9. If designated to do so, a notification email will be sent at this time for the task with the lowest checklist task sequence (if the Email Notification field is selected).

Note: If a notification email message did <u>not</u> go through, a message will appear; click **OK** and then contact the Business Office in order to check the activity log file (System Log tab within the Activity Log option) and resolve the error(s). If an email is rejected, the rejection notice will be sent to the appropriate address for the designated email address in the Email Manager option.

<u>Changing a Checklist Instance</u>:
1. From the Human Resources screen, select the **Options** menu and then **Checklist Instances**.

Note: An alert for *View Checklist Instances* will appear on the Human Resources screen under the Alerts section if there is a task on a checklist instance pending your completion (or completion by any user with rights to Human Resources if the Responsible User ID field was <u>not</u> completed); if applicable, click the View Checklist Instances alert, double-click on the task for which to view or edit, and then continue with Step 3 (below). Also, if viewing an employee within the Employee File and there is a checklist instance with tasks still pending for the employee, the **Open Checklist Instance** button will appear in green; if desired, click the button to open the checklist instance for the employee and then continue with Step 3 (below).

2. At the Checklist Instances screen, enter the description of the checklist instance to change in the Checklist Instance Description field, or click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes to the checklist instance. The Checklist ID field <u>cannot</u> be changed.

Note: All the active tasks appear in the Checklist Instance Tasks List, but the filters can be changed if desired. The status for each task can be changed to **Closed** as each step is completed (or changed to **Cancelled** if the task will <u>not</u> be completed for the particular checklist instance). If a

change is made to a task, such as the task is closed or cancelled, the system tracks the user who made the change in the Changed by User ID field and the date it was changed in the Changed Date field.

Tip: If desired, click the **Go To** button located to the right of the Employee ID field to open the specified employee's record in the Employee File.

4. After all the changes have been made, click the **Save** button.

5. If the description for the checklist instance was changed, a prompt will appear verifying whether or not to change the description. To change the description for the checklist instance, click the **Change** button. To not change the description and revert to use the original description, click the **Revert to Original** button.

6. If designated to do so, a notification email will be sent at this time for the task with the next checklist task sequence (if the Email Notification field is selected).

Note: If a notification email message did not go through, a message will appear; click **OK** and then contact the Business Office in order to check the activity log file (System Log tab within the Activity Log option) and resolve the error(s). If an email is rejected, the rejection notice will be sent to the appropriate address for the designated email address in the Email Manager option.

Deleting a Checklist Instance:
1. From the Human Resources screen, select the **Options** menu and then **Checklist Instances**.

2. At the Checklist Instances screen, enter the description of the checklist instance to delete in the Checklist Instance Description field, or click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the checklist instance to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Select Email Criteria

The Select Email Criteria option in Human Resources allows a user to select a group of employees based upon certain criteria, such as birth date, hire/rehire date, certificate expiration date, a benefit, or a custom field, and then send an email message to those employees. For example, an email message could be sent to those employees with certificates expiring this year as a reminder to get copies of their new certificates to the Business Office, or an email message could be sent to all employees with general information for an upcoming meeting.

In order to use the Select Email Criteria option, complete the following: 1) complete the General Options tab in the Email Manager option (if <u>not</u> already completed) by selecting the Enable Email Manager field and completing the remaining fields; 2) if needed, on the Email Addresses tab in the Email Manager option, add an email address to use when emailing; 3) complete the Default Email Address ID field in the Notification Options section on the Human Resources tab in the Email Manager option, if desired; 4) enter up to three email addresses (for Business, Personal, and/or Other) in the Employee File for each employee who will be emailed; and 5) select the Other Communication field for each applicable email address for the employees (a checkmark will appear in the box if the field is selected).

<u>Sending an Email Using Email Criteria</u>:

1. From the Human Resources screen, select the **Options** menu and then **Select Email Criteria**.

2. At the Select Email Criteria screen, click the **down-arrow** button for the Select field to designate the field to use as the basis for entering the criteria in which to select the employees to include when sending the email message. For example, to be able to send an email message to those employees who have <u>not</u> had a physical in the past five years, select **Physical Examination Date**; or to be able to send an email message to those employees hired within the last 90 days, select **Hire/Rehire Date**. See **Diagram A**.

   Note: If **Hire/Rehire Date**, **Probation Date**, **Termination Date**, or **Other Date** is specified in the Select field and an employee has multiple Hire/Rehire, Probation, Termination, or Other Dates entered in the Employee Dates List on the Employment screen in the Employee File, the system uses only the latest (greatest) Hire/Rehire, Probation, Termination, or Other Date for the employee.

   Tip: To be able to send an email message to all employees, select a field that appears in the Employee File for all employees, such as **Hire/Rehire Date** or **Birth Date**, and then leave the date range <u>blank</u>.

3. If **Benefit** was selected in the Select field, the Benefit ID field will appear. Enter the ID of the benefit to use in the Benefit ID field. If the ID is not known, click the **down-arrow** button to select the correct one.

4. If **Custom Date Fields**, **Custom Numeric Fields**, or **Custom Text Fields** was selected in the Select field, the Custom Field field will appear. Enter the name of the custom field (date, numeric, or text type) to use in the Custom Field field, or click the **down-arrow** button to select the correct one.

5. If a date field was selected in the Select field, the From Date and To Date fields appear. If desired, enter a range of dates in the From Date and To Date fields to display only certain employees with a specified date for the particular field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired dates. Leave the From Date and To Date fields <u>blank</u> to display all employees with the specified field (for example, see all employees with a certificate entered on the Certificates screen in the Employee File if the Certificate Expiration Date field was selected).

6. Click the **Display** button to see the list of employees who match the specified criteria.

7. All the active employees who match the criteria (have the

Diagram A

particular field and are within the specified date range, if applicable) and have an email address entered with the Other Communication field selected appear in the Employee Selection List (on the bottom half of the screen). Specify which employees to include when sending the email message by clicking the box for the Selected column to the left of the desired employee. A checkmark will appear in the box if the employee is selected. To select all the employees listed on the screen, click the **Select All** button located above the Employee Selection List. If desired, change the filters to modify the employees displayed here.
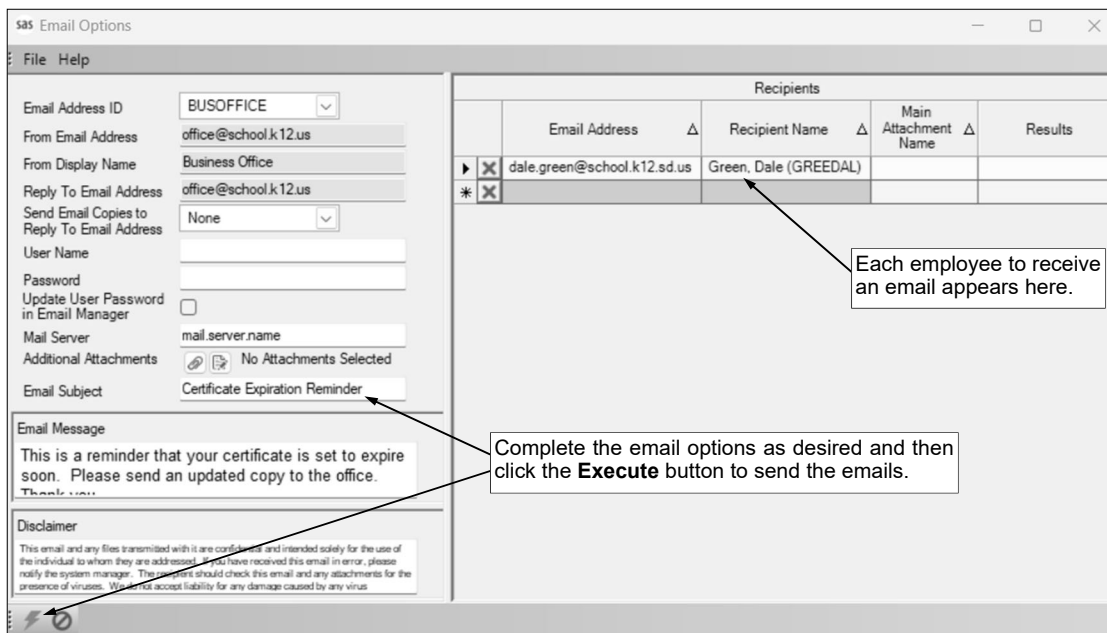
8. Once all the desired employees have been selected, click the **Email** button to continue.

9. The Email Options screen will appear; complete the email options as needed. See **Diagram B**.

   a. Enter the ID of the email address to use when sending the emails in the Email Address ID field, or click the **down-arrow** button to select the correct one. If applicable, the ID of the email address designated in the Email Manager option will appear by default, but can be changed if needed.

   b. The email address from which the emails will be sent for the specified ID appears in the From Email Address field and <u>cannot</u> be changed on this screen.

   c. The name to show who the emails are from (within the recipient's inbox) for the specified ID appears in the From Display Name field and <u>cannot</u> be changed on this screen.

   d. The email address that will be used when a recipient replies to an email sent for the specified ID appears in the Reply To Email Address field and <u>cannot</u> be changed on this screen.

   e. In the Send Email Copies to Reply To Email Address field, enter the appropriate option (**None**, **CC**, or **BCC**) for whether or <u>not</u> to send copies of the emails to the email address designated in the Reply To Email Address field, or click the **down-arrow** button to select the correct one. To <u>not</u> send copies to the email address designated in the Reply To Email Address field, select **None**. To send carbon copies of the emails to the email address designated in the Reply To Email Address field, select **CC**. To send blind carbon copies to the email address designated in the Reply To Email Address field, select **BCC**. By default, **None** is selected.

   f. If the specified email address has the User Name field completed on the Email Addresses tab in the Email Manager option, the user ID appears in the User Name field and <u>cannot</u> be changed on this screen; however, if the User Name field is <u>not</u> completed for the email address, enter the user ID for the email address in the User Name field only if required by your organization's SMTP mail server. The user ID can be alphanumeric and up to **128** characters long. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

   Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the user name will be automatically included.

   g. If required by your organization's SMTP mail server, enter the password for the email address in the Password field. The password can be alphanumeric and up to **128** characters long. The password is case sensitive. If the Password field is completed on the Email Addresses tab in the Email Manager option, the password will appear in the Password field, but can be changed if needed. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

   Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the password will be automatically included.

   h. If desired, select the Update User Password in Email Manager field to have the system retain the password (and user ID, if applicable) entered in the Password field (and User Name field) for the specified email address, if applicable. A checkmark will appear in the box if the field is selected.

   Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

   i. The name of the mail server that will be used to send the emails (as designated in the Email Manager option) appears in the Mail Server field. If using your organization's SMTP mail server, the name can be changed if needed.

   Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

   j. If desired, click the **Attach File** button for the Additional Attachments field to browse to and select one or more files to attach to the emails. If needed, click the **Edit Record** button for the Additional Attachments field to view or remove the files selected to be attached to the emails. The number of files selected will appear to the right of the buttons.

Each employee to receive an email appears here.

Complete the email options as desired and then click the **Execute** button to send the emails.

Diagram B

k. Enter the subject line to use for the emails in the Email Subject field. The subject line can be alphanumeric and an unlimited number of characters. If applicable, a generic default subject line appears, but can be changed.

l. Enter the text for the message (body) of the emails in the Email Message field. The text can be alphanumeric and an unlimited number of characters. If applicable, a generic default message appears, but can be changed.

m. The text to use as the disclaimer as entered in the Email Manager option appears in the Disclaimer field. If needed, the text can be changed. The text for the disclaimer can be alphanumeric and an unlimited number of characters.

n. The recipients to receive the emails appear in the Recipients List on the right side of the screen. The email address and name for each recipient displays, along with the file name of the main attachment if applicable. If needed, edit the Recipients List as desired.

Tip: When sending emails from within the Select Email Criteria option in the Human Resources module, only the applicable employees that have an email address entered in the Employee File with the Other Communication field selected will be included in the Recipients List.

- If applicable, to change the email address for a recipient, click in the Email Address field for the recipient and key the desired email address.
- To add an email address to the list so that the email message will be sent to an additional recipient, complete the Email Address field in the blank line (indicated with an asterisk) at the bottom of the Recipients List.
- To delete an email address so that the email message will not be sent to a particular recipient, click the **Delete** button located to the left of the desired record in the Recipients List; when prompted to delete the record, click **Yes**.

Note: As the email messages are sent, the Results column in the Recipients List will be updated with the status; for example, "Sent mm/dd/yyyy at hh:mm AM/PM" will appear after the email was sent successfully.

10. Click the **Execute** button to send the emails.

Note: If the first email is unable to be sent successfully, a prompt will appear asking to continue trying to send the remaining emails; click **Yes** to continue sending the remaining emails, or click **No** to quit sending the emails at this time (and, if desired, edit the Recipients List and then resend). If an email is rejected because an incorrect email address was entered for a recipient, the rejection notice will be sent the appropriate address for the designated email address in the Email Manager option.

11. A message will appear in the status bar once the emails have been sent.

12. Click the **X** in the upper right-hand corner to close the Email Options screen.

Note: If there was one or more emails that were not successfully sent, the **Cancel** button and **Retry** button appear at the bottom of the Email Options screen. If desired, edit the Recipients List and then click the **Retry** button to try resending the emails to those employees who did not have one sent initially; otherwise, click the **Cancel** button to close the Email Options screen.

Sick Banks

Sick Banks is an option available in Human Resources to create a sick bank for one or more leaves (as defined in Payroll). For example, a sick bank can be created for sick leave. The Sick Banks option allows deposits of a leave into the bank and withdrawals from the bank as needed. When a sick bank is created within the Sick Banks option, a leave balance for the newly created sick bank is added in the Leave File in Payroll for tracking and usage purposes. Any restrictions on the sick bank as set by the school district are able to be stipulated when adding the sick bank, such as a minimum or maximum amount of leave that can be deposited or withdrawn.

Within the Sick Banks option, the history of the employees who deposited to or withdrew from the sick bank can also be viewed.

Adding a Sick Bank:
1. From the Human Resources screen, select the **Maintenance** menu, and then **Sick Banks**.
2. At the Sick Banks screen, click the **New Record** button. See **Diagram A**.

   Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.

3. Enter a unique ID for the sick bank in the Sick Bank ID field. The ID can be alphanumeric and up to **10** characters long (no spaces).

   Note: To have the system automatically assign the ID *using the first 10 characters (letters and numbers only)* of the description, leave the ID field <u>blank</u>; once the record is saved, the ID will be assigned.

If desired, click the **Deposit Information** or **Withdrawal Information** tab to view the deposits or withdrawals made to the sick bank.

Diagram A

4. Enter the description for the sick bank in the Sick Bank Description field. The description can be up to **30** characters long.

5. If applicable, in the Default Main Leave ID field, enter the ID of the leave to have selected by default when processing sick bank deposits and withdrawals. If the ID is not known, click the **down-arrow** button to select the correct one. Typically, the Default Main Leave ID field is only completed if the sick bank will be tied to only one leave (for example, tied only to sick leave); otherwise, if the sick bank will be tied to multiple leaves, leave this field <u>blank</u>.

   Note: Only leaves with the Main Leave ID field <u>blank</u> in the Leave File appear by default when searching, and can be selected or entered for this field.

6. If the sick bank will only operate for a certain period of time, enter the date the sick bank takes effect in the Sick Bank Starting Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   Note: If a date is entered in this field, all deposit entries made to this sick bank must be on or after this date.

7. If the sick bank will only operate for a certain period of time, enter the date the sick bank expires in the Sick Bank Ending Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   Note: If a date is entered in this field, all deposit entries made to this sick must be before or on this date.

8. If applicable, enter the beginning balance of the sick bank in the Sick Bank Initial Balance field. The amount entered in this field will be added to both the Posted Balance and the Total Balance.

9. If applicable, enter the number that the Total Balance of the sick bank must <u>not</u> go below in the Sick Bank Lower Limit field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have a lower limit.

    Tip: To allow the sick bank balance to go negative (without any warning), leave the Sick Bank Lower Limit field <u>blank</u>; however, to prevent the sick bank balance from going negative, enter **0** in the field.

10. If applicable, enter the number that the Total Balance of the sick bank must <u>not</u> go above in the Sick Bank Upper Limit field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have an upper limit.

11. If applicable, enter the minimum number of units per employee that can be deposited into the sick bank at one time in the Sick Bank Deposit Minimum field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have a minimum deposit.

12. If applicable, enter the maximum number of units per employee that can be deposited into the sick bank at one time in the Sick Bank Deposit Maximum field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have a maximum deposit.

13. If applicable, enter the minimum number of units per employee that can be withdrawn from the sick bank at one time in the Sick Bank Withdrawal Minimum field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have a minimum withdrawal.

14. If applicable, enter the maximum number of units per employee that can be withdrawn from the sick bank at one time in the Sick Bank Withdrawal Maximum field; otherwise, leave this field <u>blank</u> if the sick bank does <u>not</u> have a maximum withdrawal.

15. If desired, enter any additional information to track for the sick bank in the Comments field. The comment can be up to **1,000** characters long.

16. Select the Create Pay Code field to have the system automatically add a pay code in Payroll using the same ID and description as the sick bank, and also have the pay code tied to the sick bank leave. A checkmark will appear in the box if the field is selected. *SUI recommends that the Create Pay Code field is selected when adding a new sick bank.*

    Note: If this field is <u>not</u> selected at this time, a pay code tied to the sick bank leave will need to be added manually prior to making any deposits or withdrawals for the sick bank (or this field must be selected at a later time and then the record saved).

17. Click the **Save** button.

    Note: When the sick bank is saved, a sick bank leave is automatically added to the Leave File in Payroll, and a sick bank pay code is automatically added to the Pay Code File in Payroll (only if the Create Pay Code field was selected). The Posted Balance and Total Balance fields appear in the upper right corner of the screen to show the balance for the sick bank; the Total Balance includes both posted and unposted entries.

18. If desired, click the **Deposit Information** tab to view the deposits made to the sick bank, or the **Withdrawal Information** tab to view the withdrawals made to the sick bank.

Changing a Sick Bank:
1. From the Human Resources screen, select the **Maintenance** menu, and then **Sick Banks**.

2. At the Sick Banks screen, enter the ID of the sick bank to change in the Sick Bank ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Make the desired changes to the sick bank.

    Note: The Posted Balance and Total Balance fields appear in the upper right corner of the screen to show the balance for the sick bank; the Total Balance includes both posted and unposted entries. If desired, click the **Deposit Information** tab to view the deposits made to the sick bank, or the **Withdrawal Information** tab to view the withdrawals made to the sick bank.

4. After all the changes have been made, click the **Save** button.

5. If the ID for the sick bank was changed, a prompt will appear verifying whether or not to change the ID or add a new one. To change the ID for the sick bank, click the **Change** button. To <u>not</u> change the ID and revert to use the original ID, click the **Revert to Original** button. To add a new sick bank with the specified ID that is a duplicate of the current sick bank, click the **Create New** button.

<u>Deleting a Sick Bank</u>:

<u>Note</u>: If a sick bank has deposit or withdrawal entries made against it, the system will <u>not</u> allow it to be deleted.

1. From the Human Resources screen, select the **Maintenance** menu, and then **Sick Banks**.

2. At the Sick Banks screen, enter the ID of the sick bank to delete in the Sick Bank ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.

3. Once the sick bank to delete is displayed on the screen, click the **Delete** button; when prompted to delete the record, click **Yes**.

Sick Bank Deposits

The Sick Bank Deposits option in Human Resources is used to make a deposit of a leave into a sick bank for a selected group of employees. The Sick Bank Deposits option allows the user to enter the date and description of the deposit entry, specify the number of units to deposit, and select the employees who are making the deposit. When the Sick Bank Deposits option is executed, the sick bank leave is added to the selected employees (and reflected on the Leaves screen in the Employee File), and entries are posted to a batch of pay period entries in Payroll (for inclusion in a payroll calculation batch for posting) that will decrease the leave used with the sick bank deposit (for example, sick leave) for each selected employee by the specified amount, and increase the sick bank.

Email messages can be sent from within the Sick Bank Deposits option to those employees making the deposit; the message can inform the employees that the specified number of units will be deducted from their leave as of a certain date.

Processing Sick Bank Deposits:
1. From the Human Resources screen, select the **Options** menu and then **Sick Bank Deposits**.
2. At the Sick Bank Deposits screen, enter the ID of the sick bank for which to make the deposit in the Sick Bank ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.
3. Enter the date to show when the deposit was made in the Deposit Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

   Note: The date entered here must be within the starting and ending dates of the sick bank, if applicable, and be within the appropriate fiscal year of the sick bank leave and the leave(s) selected for the deposit.
4. Enter the amount to deposit into the sick bank from each employee (and decrease from the applicable leave) in the Number of Units field.

   Note: If applicable, the number entered here must <u>not</u> be under the Sick Bank Deposit Minimum or above the Sick Bank Deposit Maximum as defined for the sick bank; also, the total deposit <u>cannot</u> take the Total Balance of the sick bank above the Sick Bank Upper Limit.
5. Enter the ID of the pay code to use for the sick bank deposit entries posted to a batch of pay period entries in the Pay Code ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

   Note: Only pay codes tied to the specified sick bank leave appear by default when searching, and can be selected or entered for this field.

Diagram A

6. Enter the description to use for the deposit in the Deposit Description field. The description can be up to **1,000** characters long. Leave the field <u>blank</u> to default to a generic description of "Sick Bank Deposit".

7. Complete the Employee Sick Bank Leave Information section.

    a. Enter the beginning and ending date for the fiscal year of the leave to use when making the deposit in the Fiscal Year Begin Date and Fiscal Year End Date fields. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired dates.

        Note: If the sick bank leave has <u>not</u> been set up for the employees making the deposit, the sick bank leave will be added to the Employee File using the dates specified here.

    b. Select the Carry Over Balance field to have the Carry Over Balance field on the Leaves screen in the Employee File selected when the sick bank leave is added to the Employee File for the employees making the deposit, if applicable. A checkmark will appear in the box if the field selected.

8. The Current Balance and New Balance fields display the total balance for the sick bank and what the new total balance will be after making the deposit.

9. In the Sick Bank Leaves List, select the leave(s) from which to take away the specified number of units for employees and deposit to the sick bank. To select a leave, click the box for the Selected column to the left of the desired leave ID. A checkmark will appear in the box if the leave is selected. If applicable, the leave specified in the Default Main Leave ID field for the sick bank will be selected by default, but changes can be made. If the sick bank is tied to only one leave (for example, tied only to sick leave), only the one leave should be selected here; otherwise, if the sick bank is tied to multiple leaves, select all the applicable leaves.

10. Click the **Display** button.

11. The employees who have the selected leave(s) appear in the Sick Bank Deposits List (on the bottom half of the screen). Select the employees who are making the deposit into the sick bank by clicking the box for the Selected column to the left of the desired employee. A checkmark will appear in the box if the employee is selected. To select all the employees listed on the screen, click the **Select All** button located above the Sick Bank Deposits List. If desired, change the filters to modify the employees displayed here.

    Tip: For each employee listed here, the Leave Balance and New Leave Balance display to show the employee's current balance and what the new balance will be after making the deposit. If a balance for an employee will go negative, a warning icon will display to the right of the New Leave Balance; make changes as desired before continuing.

    Note: If multiple leaves are selected in the Sick Bank Leaves List and an employee has more than one of the selected leaves, the employee will be listed multiple times in the Sick Bank Deposits List; in which case, select only <u>one</u> line to process for the employee.

12. If desired, click the **Email** button at this time to send an email message to the employees selected to make the deposit to the sick bank.

13. Click the **Execute** button to continue processing the sick bank deposit.

    Note: If the Warn if Negative Balance field is selected in the Leave File for the leave(s) used with the sick bank deposit, and an employee has a negative New Leave Balance due to the deposit, a message will appear asking to continue posting negative balances; click **OK** to continue posting the entries and allowing the employees to go to negative balances, or click **Cancel** to cancel and make changes before continuing.

14. When prompted, select the pay period entries batch in which to post the sick bank deposit entries (for inclusion in a payroll calculation batch for posting) by double-clicking the desired batch.

    Note: Only new (or empty) batches, or batches with other sick bank deposit and/or withdrawal entries, can be selected. If a batch does <u>not</u> exist, the Payroll Entry Batch screen will appear prompting for the batch information so that a batch can be created; in which case, complete the batch options and then click the **Save** button. The batches of pay period entries used with sick bank deposits and/or withdrawals will be set to Read Only.

15. When prompted to continue posting, click **Yes**.

16. Complete a payroll calculation and include the pay period entries batch containing the sick bank deposit entries; once the payroll calculation batch is updated, the entries for the deposit will become posted.

Sending an Email within Sick Bank Deposits:

Note: In order to send email notifications from within the Sick Bank Deposits option, complete the following: 1) complete the General Options tab in the Email Manager option (if <u>not</u> already completed) by selecting the Enable Email Manager field and completing the remaining fields; 2) if needed, on the Email Addresses tab in the Email Manager option, add an email address to use when emailing; 3) complete the Default Email Address ID field in the Notification Options section on the Human Resources tab, if desired; 4) enter up to three email addresses (for Business, Personal, and/or Other) in the Employee File for each employee who will be emailed; and 5) select the Other Communication field for each applicable email address for the employees (a checkmark will appear in the box if the field is selected).

Tip: Before sending an email from within the Sick Bank Deposits option, the information for a deposit must first be entered.

1. From the Sick Bank Deposits screen, click the **Email** button.

2. Specify the employees for which to send the email by selecting **Selected** and/or **Unselected**. To select a particular employee selection, click the box for the Selected column to the left of the desired item. A checkmark will appear in the box if the item is selected.

3. Click the **Execute** button to continue.

4. The Email Options screen will appear; complete the email options as needed.

   a. Enter the ID of the email address to use when sending the emails in the Email Address ID field, or click the **down-arrow** button to select the correct one. If applicable, the ID of the from email address designated in the Email Manager option will appear by default, but can be changed if needed.

   b. The email address from which the emails will be sent for the specified ID appears in the From Email Address field and <u>cannot</u> be changed on this screen.

   c. The name to show who the emails are from (within the recipient's inbox) for the specified ID appears in the From Display Name field and <u>cannot</u> be changed on this screen.

   d. The email address that will be used when a recipient replies to an email sent for the specified ID appears in the Reply To Email Address field and <u>cannot</u> be changed on this screen.

   e. In the Send Email Copies to Reply To Email Address field, enter the appropriate option (**None**, **CC**, or **BCC**) for whether or <u>not</u> to send copies of the emails to the email address designated in the Reply To Email Address field, or click the **down-arrow** button to select the correct one. To <u>not</u> send copies to the email address designated in the Reply To Email Address field, select **None**. To send carbon copies of the emails to the email address designated in the Reply To Email Address field, select **CC**. To send blind carbon copies of the emails to the email address designated in the Reply To Email Address field, select **BCC**. By default, **None** is selected.

   f. If the specified email address has the User Name field completed on the Email Addresses tab in the Email Manager option, the user ID appears in the User Name field and <u>cannot</u> be changed on this screen; however, if the User Name field is <u>not</u> completed for the email address, enter the user ID for the email address in the User Name field only if required by your organization's SMTP mail server. The user ID can be alphanumeric and up to **128** characters long. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

   Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the user name will be automatically included.

   g. If required by your organization's SMTP mail server, enter the password for the email address in the Password field. The password can be alphanumeric and up to **128** characters long. The password is case sensitive. If the Password field is completed on the Email Addresses tab in the Email Manager option, the password will appear in the Password field, but can be changed if needed. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

   Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the password will be automatically included.

   h. If desired, select the Update User Password in Email Manager field to have the system retain the password (and user ID, if applicable) entered in the Password field (and User Name field) for the specified email address, if applicable. A checkmark will appear in the box if the field is selected.

Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

i. The name of the mail server that that will be used to send the emails (as designated in the Email Manager option) appears in the Mail Server field. If using your organization's SMTP mail server, the name can be changed if needed.

Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

j. If desired, click the **Attach File** button for the Additional Attachments field to browse to and select one or more files to attach to the emails. If needed, click the **Edit Record** button for the Additional Attachments field to view or remove the files selected to be attached to the emails. The number of files selected will appear to the right of the buttons.

k. Enter the subject line to use for the emails in the Email Subject field. The subject line can be alphanumeric and an unlimited number of characters. If applicable, a generic default subject line appears, but can be changed.

l. Enter the text for the message (body) of the emails in the Email Message field. The text can be alphanumeric and an unlimited number of characters. If applicable, a generic default message appears, but can be changed.

m. The text to use as the disclaimer as entered in the Email Manager option appears in the Disclaimer field. If needed, the text can be changed. The text for the disclaimer can be alphanumeric and an unlimited number of characters.

n. The recipients to receive the emails appear in the Recipients List on the right side of the screen. The email address and name for each recipient displays, along with the file name of the main attachment if applicable. If needed, edit the Recipients List as desired.

Tip: When sending emails from within the Sick Bank Deposits option in the Human Resources module, only the applicable employees that have an email address entered in the Employee File with the Other Communication field selected will be included in the Recipients List.

- If applicable, to change the email address for a recipient, click in the Email Address field for the recipient and key the desired email address.

- To add an email address to the list so that the email message will be sent to an additional recipient, complete the Email Address field in the blank line (indicated with an asterisk) at the bottom of the Recipients List.

- To delete an email address so that the email message will not be sent to a particular recipient, click the **Delete** button located to the left of the desired record in the Recipients List; when prompted to delete the record, click **Yes**.

Note: As the email messages are sent, the Results column in the Recipients List will be updated with the status; for example, "Sent mm/dd/yyyy at hh:mm AM/PM" will appear after the email was sent successfully.

5. Click the **Execute** button to send the emails.

Note: If the first email is unable to be sent successfully, a prompt will appear asking to continue trying to send the remaining emails; click **Yes** to continue sending the remaining emails, or click **No** to quit sending the emails at this time (and, if desired, edit the Recipients List and then resend). If an email is rejected because an incorrect email address was entered for a recipient, the rejection notice will be sent to the appropriate address for the designated email address in the Email Manager option.

6. A message will appear in the status bar once the emails have been sent.

7. Click the **X** in the upper right-hand corner to close the Email Options screen.

Note: If there was one or more emails that were not successfully sent, the **Cancel** button and **Retry** button appear at the bottom of the Email Options screen. If desired, edit the Recipients List and then click the **Retry** button to try resending the emails to those employees who did not have one sent initially; otherwise, click the **Cancel** button to close the Email Options screen.

Sick Bank Withdrawals

The Sick Bank Withdrawals option in Human Resources is used to make a withdrawal from a sick bank to a leave for a particular employee. The Sick Bank Withdrawals option allows the user to select the employee to receive the withdrawal, enter the date and description of the withdrawal entry, and specify the number of units to withdraw. When the Sick Bank Withdrawals option is executed, entries are posted to a batch of pay period entries in Payroll (for inclusion in a payroll calculation batch for posting) that will increase the leave used with the sick bank withdrawal (for example, sick leave) for the selected employee by the specified amount, and decrease the sick bank.

Processing Sick Bank Withdrawals:
Note: In order for a sick bank withdrawal to be processed for an employee, the employee must first have the sick bank leave set up on the Leaves screen in the Employee File; the sick bank leave is added to the Leaves screen in the Employee File when completing a sick bank deposit.

1. From the Human Resources screen, select the **Options** menu and then **Sick Bank Withdrawals**.

2. At the Sick Bank Withdrawals screen, enter the ID of the employee to receive the withdrawal from the sick bank in the Employee ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. See **Diagram A**.

3. Enter the ID of the sick bank from which to make the withdrawal in the Sick Bank ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

4. Enter the date to show when the withdrawal was made in the Withdrawal Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.

    Note: The date entered here must be within a fiscal year of the sick bank leave and the leave selected for the withdrawal.

5. Enter the amount to decrease from the sick bank and give to the employee in the Number of Units field.

    Note: If applicable, the number entered here must not be under the Sick Bank Withdrawal Minimum or above the Sick Bank Withdrawal Maximum as defined for the sick bank; also, the withdrawal cannot take the Total Balance of the sick bank below the Sick Bank Lower Limit.

6. Enter the ID of the pay code to use for the sick bank withdrawal entries posted to a batch of pay period entries in the Pay Code ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.

Diagram A

    Note: Only pay codes tied to the specified sick bank leave appear by default when searching, and can be selected or entered for this field.

7. Enter the ID of the leave for which to add the specified number of units for the employee from the sick bank withdrawal in the Sick Bank Leave ID field. If the ID is not known, click the **down-arrow** button to select the correct one. If applicable, the leave specified in the Default Main Leave ID field for the sick bank will appear in this field by default, but can be changed.

    Note: Only the leaves the employee has set up that are not tied a main leave (within the Leave File) appear by default when searching, and can be selected or entered for this field.

8. Enter the description to use for the withdrawal in the Withdrawal Description field. The description can be up to **1,000** characters long. Leave the field blank to default to a generic description of "Sick Bank Withdrawal".

9. All the previous deposits and withdrawals for the sick bank that the specified employee has made appear in the Employee Sick Bank History List (on the bottom half of the screen).

10. Click the **Execute** button.

11. When prompted, select the pay period entries batch in which to post the sick bank withdrawal entries (for inclusion in a payroll calculation batch for posting) by double-clicking the desired batch.

    Note: Only new (or empty) batches, or batches with other sick bank deposit and/or withdrawal entries, can be selected. If a batch does not exist, the Payroll Entry Batch screen will appear prompting for the batch information so that a batch can be created; in which case, complete the batch options and then click the **Save** button. The batches of pay period entries used with sick bank deposits and/or withdrawals will be set to Read Only.

12. When prompted to continue posting, click **Yes**.

13. Complete a payroll calculation and include the pay period entries batch containing the sick bank withdrawal entries; once the payroll calculation batch is updated, the entries for the withdrawal will become posted.

Training Events

The Training Events option in Human Resources is used to define the information for a specific training, such as the date, time, location, presenter, status, and whether it is an internal or external training. Once a training event has been added, employees can then be tied to the training event, either from within the Training Events option or on the Trainings screen in the Employee File.

Once a training event has been completed, the status can be updated to "Held" within the Training Events option and the employees can be marked as having attended the training event. The individual expenses to attend an external training event (and the mileage, if applicable) can also be tracked for an employee, if desired.

Also, email messages can be sent for a particular training event from within the Training Events option (for example, a training date and time reminder email message can be sent to the employees enrolled in a particular upcoming training event, or a reminder email message of future training events can be sent to those employees who ended up not attending a certain training event for which they had been enrolled).

<u>Adding a Training Event</u>:
1. From the Human Resources screen, select the **Options** menu and then **Training Events**.
2. At the Training Events screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter a description for the new training event in the Training Event Description field. The description can be up to **40** characters in length. See **Diagram A**.
4. Enter the ID of the training to schedule in the Training ID field. If the ID is not known, click the **down -arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
5. For internal trainings only, enter the ID of the site where the training event will be held in the Site ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
6. For internal trainings only, enter the ID of the building where the training event will be held in the Building ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
7. For internal trainings only, enter the ID of the room where the training event will be held in the Room ID field, if desired. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
8. If desired, enter the ID of the person or company presenting the training event in the Trainer ID field. The ID entered here must be for a valid employee, employer, payee, or vendor. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature.
9. Enter the appropriate status (**Cancelled**, **Held**, or **Scheduled**) for the training event in the Event Status field, or click the **down-arrow** button to select the correct one. When adding a new training event, the status will default to **Scheduled**, but can be changed to **Held** once the training event has been completed (or changed to **Cancelled** if the training event will <u>not</u> take place).

    Note: Once a training event has been saved, if the Event Status field is changed to **Held**, a message will appear asking whether to select the Training Event Attended field (located in the Event Roster List) for all the employees tied to the training event; to then update all the employees who currently do <u>not</u> have the field selected, click **Yes**.
10. Enter the date when the training event will begin in the Training Event Start Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date.
11. Enter the time when the training event will begin in the Training Event Start Time field. Use the **hh:mm AMPM** format. If military time is entered, the system will automatically convert the hours to regular time; for example, if **1400** (or **14:00**) is entered, the system will automatically convert it to **2:00**.

    Note: The colon does <u>not</u> have to be entered between the hour and the minutes; for example, enter 8 o'clock as **800** or **0800**. Also, the AM or PM does <u>not</u> have to be entered, if desired, as the hours 7 through 11 will default to AM and hours 12 through 6 will default to PM.

Diagram A

12. Enter the date when the training event will end in the Training Event End Date field. Use the **mm/dd/yyyy** format or click the **down-arrow** button to select the desired date. Leave the field <u>blank</u> to default to the date entered in the Training Event Start Date field.

13. Enter the time when the training event will end in the Training Event End Time field. Use the **hh:mm AMPM** format. If military time is entered, the system will automatically convert the hours to regular time; for example, if **1400** (or **14:00**) is entered, the system will automatically convert it to **2:00**.

    Note: The colon does <u>not</u> have to be entered between the hour and the minutes; for example, enter 8 o'clock as **800** or **0800**. Also, the AM or PM does <u>not</u> have to be entered, if desired, as the hours 7 through 11 will default to AM and hours 12 through 6 will default to PM.

14. If desired, enter the number of hours for the length of the training event in the Hours field. The number of hours can be up to **8** digits long (including the decimal point if applicable) and will be rounded to **2** decimal places by the system if capable.

15. If applicable, select the Internal Training Event field to indicate the training event is an internal training to be held within the school district for employees. A checkmark will appear in the box if the field is selected. When adding a new training event, this field is <u>not</u> selected by default.

16. If desired, enter any additional information to track for the training event in the Comments field. The comment can be up to **1,000** characters long.

17. Complete the Event Roster section to tie the appropriate employees to the training event. Employees can be entered individually (one at a time) or a group of employees can be selected all at once.

    Note: If desired, employees can also be added to a training event from within the Employee File (on the Trainings screen).

    Method 1: Entering One Employee at a Time:
    a. In the blank line (indicated with an asterisk) at the bottom of the Event Roster List, enter the ID of the employee to enroll in the training event in the Employee ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. The name of the specified employee will appear in the Last Name and First Name fields and <u>cannot</u> be changed.

    b. Select the Training Event Attended field to indicate the employee attended the training event. A checkmark will appear in the box if the field is selected. When adding a new training event, the

Training Event Attended field is <u>not</u> selected by default; once the training event has been completed, the field can be selected for those employees who attended the training.

   c. For *external* trainings only, complete the applicable Expense fields to track the cost to attend the training event for the employee, if desired. The expenses that can be tracked for a training event are: Air Transportation Expense, Ground Transportation Expense, Lodging Expense, Food Expense, Event Fee Expense, and Miscellaneous Expense. The amounts can be up to **14** digits long (including the decimal point) and will be rounded to **2** decimal places by the system if capable.

   d. For *external* trainings only, enter the total number of miles to and from the training event for the employee in the Mileage field, if desired. The number can be up to **5** digits long (<u>no</u> decimals).

   e. If desired, enter any additional information to track for the employee for this training event in the Comments field. The comment can be up to **1,000** characters long.

   f. If the employee has an email addresses entered in the Employee File with the Other Communication field selected, a checkmark will appear in the Other Communication Email field. This field is for informational purposes only and <u>cannot</u> be changed.

   g. Repeat these steps until all the applicable employees have been added to the specified training event.

   <u>**Method 2: Selecting a Group of Employees:**</u>

   a. Click the **Multiple Employee Selection** button located above the Event Roster List.

   b. The Employee Selection screen will appear listing all the active employees by default. Specify which of the employees to add to the training event by clicking the box for the Selected column to the left of the desired employee. A checkmark will appear in the box if the employee is selected. To select all the employees listed on the screen, click the **Select All** button located above the Employee Selection List. If desired, change the filters to modify the employees displayed here.

   c. Click the **Execute** button to add the selected employees to the training event.

17. Complete the remaining information for the employees now listed in the Event Roster List, if applicable, using the instructions above for Method 1, starting with the second bulleted item.

18. Click the **Save** button.

19. If desired, click the **Email** button at this time to send an email message to the employees tied to the training event that have an email address entered in the Employee File with the Other Communication field selected.

<u>**Changing a Training Event:**</u>

1. From the Human Resources screen, select the **Options** menu and then **Training Events**.

2. At the Training Events screen, double-click the training event to change from the Scheduled Events List that appears on the right side of the screen, or click the **Find** button to select the correct one.

   Note: Only the training events with an Event Status of Scheduled appear by default in the Scheduled Events List, but the filters can be changed if needed; if using the **Find** button to search, all the training events appear by default.

3. Make the desired changes to the training event.

   a. To change the Building ID for where the training event will be held, delete the information in the Room ID field first; then after changing the Building ID, complete the Room ID field.

   b. To change the Site ID for where the training event will be held, delete the information in the Room ID and Building ID fields first; then after changing the Site ID, complete the Building ID and Room ID fields.

   c. If the Event Status field was changed to Held, a message will appear asking whether to select the Training Event Attended field (located in the Event Roster List) for all the employees tied to the training event; to update all the employees who currently do <u>not</u> have the field selected, click **Yes**.

   d. To add an employee to the specified training event, complete the blank line (indicated with an asterisk) at the bottom of the Event Roster List.

   e. To remove an employee from the specified training event, click the **Delete** button located to the left of the desired employee in the Event Roster List; when prompted to delete the record, click **Yes**.

4. After all the changes have been made, click the **Save** button.

5. If desired, click the **Email** button at this time to send an email message to the employees tied to the training event.

Deleting a Training Event:
Note: The following instructions will delete a training event, along with all the history of who was enrolled and attended the training event and the expense information for the employees, if applicable.

1. From the Human Resources screen, select the **Options** menu and then **Training Events**.

2. At the Training Events screen, double-click the training event to delete from the Scheduled Events List that appears on the right side of the screen, or click the **Find** button to select the correct one.

   Note: Only the training events with an Event Status of Scheduled appear by default in the Scheduled Events List, but the filters can be changed if needed; if using the **Find** button to search, all training events appear.

3. Once the training event to delete is displayed on the screen, click the **Delete** button located at the bottom of the screen; when prompted to delete the record, click **Yes**.

Sending an Email within Training Events:
Note: In order to send email notifications from within the Training Events option, complete the following: 1) complete the General Options tab in the Email Manager option (if not already completed) by selecting the Enable Email Manager field and completing the remaining fields; 2) if needed, on the Email Addresses tab in the Email Manager option, add an email address to use when emailing; 3) complete the Default Email Address ID field in the Notification Options section on the Human Resources tab, if desired; 4) enter up to three email addresses (for Business, Personal, and/or Other) in the Employee File for each employee who will be emailed; and 5) select the Other Communication field for each applicable email address for the employees (a checkmark will appear in the box if the field is selected).

Tip: Before sending an email from within the Training Events option, a training event must have employees entered to attend the event.

1. From the Training Events screen, click the **Email** button.

   Note: When sending an email for a training event, first bring up the training event for which to send an email (by double-clicking the training event from the Scheduled Events List that appears in the upper right side of the screen or clicking the **Find** button to select the correct one) before clicking the **Email** button.

2. Specify the employees for which to send the email by selecting **Attended** and/or **Did Not Attend**. To select a particular employee selection, click the box for the Selected column to the left of the desired item. A checkmark will appear in the box if the item is selected.

3. Click the **Execute** button to continue.

4. The Email Options screen will appear; complete the email options as needed.

   a. Enter the ID of the email address to use when sending the emails in the Email Address ID field, or click the **down-arrow** button to select the correct one. If applicable, the ID of the email address designated in the Email Manager option will appear by default, but can be changed if needed.

   b. The email address from which the emails will be sent for the specified ID appears in the From Email Address field and underline cannot be changed on this screen.

   c. The name to show who the emails are from (within the recipient's inbox) for the specified ID appears in the From Display Name field and underline cannot be changed on this screen.

   d. The email address that will be used when a recipient replies to an email sent for the specified ID appears in the Reply To Email Address field and underline cannot be changed on this screen.

   e. In the Send Email Copies to Reply To Email Address field, enter the appropriate option (**None**, **CC**, or **BCC**) for whether or not to send copies of the emails to the email address designated in the Reply To Email Address field, or click the **down-arrow** button to select the correct one. To not send copies to the email address designated in the Reply To Email Address field, select **None**. To send carbon copies of the emails to the email address designated in the Reply To Email Address field, select **CC**. To send blind carbon copies of the emails to the email address designated in the Reply To Email Address field, select **BCC**. By default, **None** is selected.

   f. If the specified email address has the User Name field completed on the Email Addresses tab in the Email Manager option, the user ID appears in the User Name field and underline cannot be changed on this screen; however, if the User Name field is not completed for the email address, enter the user ID for the email address in the User Name field only if required by your organization's

SMTP mail server. The user ID can be alphanumeric and up to **128** characters long. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the user name will be automatically included.

g. If required by your organization's SMTP mail server, enter the password for the email address in the Password field. The password can be alphanumeric and up to **128** characters long. The password is case sensitive. If the Password field is completed on the Email Addresses tab in the Email Manager option, the password will appear in the Password field, but can be changed if needed. **Consult your Technology Coordinator to determine if the field is required and what to enter in the field.**

Note: This field is disabled and <u>blank</u> if using the hosted mail server (as defined in the Email Manager option); when emails are sent, the proper information for the password will be automatically included.

h. If desired, select the Update User Password in Email Manager field to have the system retain the password (and user ID, if applicable) entered in the Password field (and User Name field) for the specified email address, if applicable. A checkmark will appear in the box if the field is selected.

Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

i. The name of the mail server that that will be used to send the emails (as designated in the Email Manager option) appears in the Mail Server field. If using your organization's SMTP mail server, the name can be changed if needed.

Note: This field is disabled if using the hosted mail server (as defined in the Email Manager option).

j. If desired, click the **Attach File** button for the Additional Attachments field to browse to and select one or more files to attach to the emails. If needed, click the **Edit Record** button for the Additional Attachments field to view or remove the files selected to be attached to the emails. The number of files selected will appear to the right of the buttons.

k. Enter the subject line to use for the emails in the Email Subject field. The subject line can be alphanumeric and an unlimited number of characters. If applicable, a generic default subject line appears, but can be changed.

l. Enter the text for the message (body) of the emails in the Email Message field. The text can be alphanumeric and an unlimited number of characters. If applicable, a generic default message appears, but can be changed.

m. The text to use as the disclaimer as entered in the Email Manager option appears in the Disclaimer field. If needed, the text can be changed. The text for the disclaimer can be alphanumeric and an unlimited number of characters.

n. The recipients to receive the emails appear in the Recipients List on the right side of the screen. The email address and name for each recipient displays, along with the file name of the main attachment if applicable. If needed, edit the Recipients List as desired.

Tip: When sending emails from within the Training Events options in the Human Resources module, only the applicable employees that have an email address entered in the Employee File with the Other Communication field selected will be included in the Recipients List.

- If applicable, to change the email address for a recipient, click in the Email Address field for the recipient and key the desired email address.
- To add an email address to the list so that the email message will be sent to an additional recipient, complete the Email Address field in the blank line (indicated with an asterisk) at the bottom of the Recipients List.
- To delete an email address so that the email message will <u>not</u> be sent to a particular recipient, click the **Delete** button located to the left of the desired record in the Recipients List; when prompted to delete the record, click **Yes**.

Note: As the email messages are sent, the Results column in the Recipients List will be updated with the status; for example, "Sent mm/dd/yyyy at hh:mm AM/PM" will appear after the email was sent successfully.

5. Click the **Execute** button to send the emails.

Note: If the first email is unable to be sent successfully, a prompt will appear asking to continue trying to send the remaining emails; click **Yes** to continue sending the remaining emails, or click **No** to quit sending the emails at this time (and, if desired, edit the Recipients List and then resend). If an email is rejected because an incorrect email address was entered for a recipient, the rejection notice will be sent to the appropriate address for the designated email address in the Email Manager option.

6. A message will appear in the status bar once the emails have been sent.

7. Click the **X** in the upper right-hand corner to close the Email Options screen.

    Note: If there was one or more emails that were <u>not</u> successfully sent, the **Cancel** button and **Retry** button appear at the bottom of the Email Options screen. If desired, edit the Recipients List and then click the **Retry** button to try resending the emails to those employees who did <u>not</u> have one sent initially; otherwise, click the **Cancel** button to close the Email Options screen.

Negotiation Lanes

The Negotiation Lanes option in Human Resources is used to tie Human Resources to the Negotiations module, if applicable. The Negotiation Lanes option allows a user to define the criteria for each lane on a package in Negotiations, so the system can place employees in the correct lanes based on their degree and additional credit hours (for example, BA + 6 additional credit hours) or position titles (for example, Head Football Coach).

Once the criteria for the lanes are entered within the Negotiation Lanes option, an additional field is available when building the FTE - Hours table within the Salary Schedules option in Negotiations to tell the system to update the lanes from Human Resources. See **Diagram B**.

Completing Negotiation Lanes:
1. From the Human Resources screen, select the **Maintenance** menu and then **Negotiation Lanes**.
2. At the Negotiation Lanes screen, click the **New Record** button.

    Note: For any field equipped with the repeat function, click the **Repeat** button or press the **Ctrl+R** keys to repeat the previous entry for the specified field. The repeat function is only available after your initial entry.
3. Enter the ID of the package defined in Negotiations for which to enter the criteria for each lane in the Package ID field. If the ID is not known, click the **down-arrow** button to select the correct one. See **Diagram A**.
4. Enter the ID of the lane for which to enter the criteria in the Lane field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
5. The description for the selected lane will appear in the Lane Description field, and can be changed if desired. If the description is changed, the change will also be reflected in Negotiations.

    Note: The description can be up to **24** characters long, not including the lane number and brackets. If the brackets and number are deleted, the system will automatically add them back in and truncate the description to **24** characters (if **25** or more characters were entered).
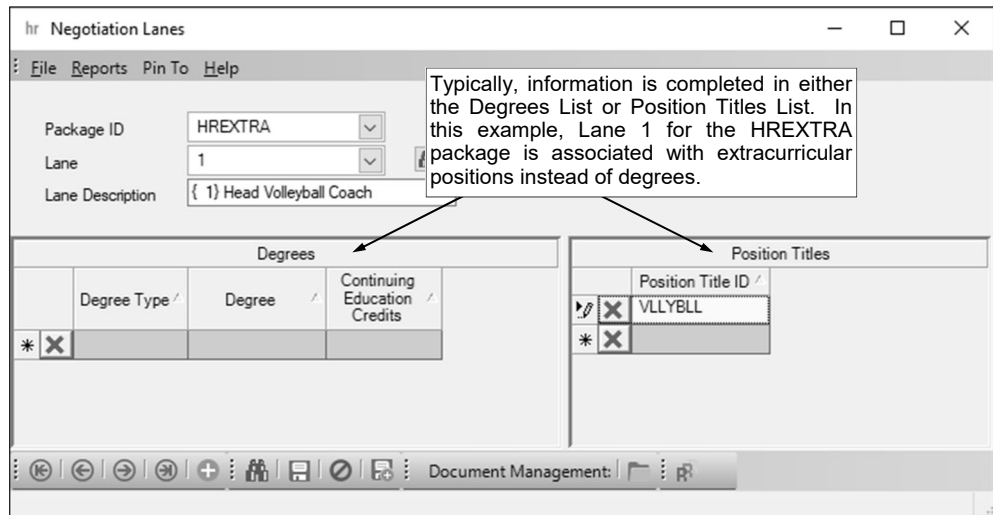
Diagram A

6. Enter the educational criteria (for example, degree and credit hours) to use for the specified lane in the Degrees List, or the position titles in the Position Titles List. Typically, information is only completed in either the Degrees List or the Position Titles List; however, information can be entered in both if needed.
    a. For degrees, enter the degree type an employee must have obtained in order to be placed in the specified lane in the Degree Type field, or enter a specific degree the employee must have obtained in the Degree field; or click the **down-arrow** button to select the correct one.

        Note: Both the Degree Type field and the Degree field cannot be completed for the same entry (row).
    b. For credits, enter the number of additional credit hours for continuing education courses the employee must have completed beyond the particular degree in order to be placed in the specified lane in the Continuing Education Credits field.

c. For position titles, enter the ID of the position title for which the employee must be assigned in order to be placed in the specified lane in the Position Title ID field. If the ID is not known, click the **down-arrow** button to select the correct one, or press the **Ctrl+F** keys to access the search feature. Only the position titles with a Position Type Usage of Internal or Both can be entered or selected for this field.

Note: An employee will be placed in the specified lane if: 1) the employee has the degree (or degree type) and number of continuing education credits (if applicable) on the Education screen in the Employee File matching one listed under the Degrees List; or 2) the employee has a position on the Positions screen in the Employee File with a corresponding position title matching one listed under the Position Titles List <u>and</u> the Position Title ID field completed with that position title for the employee's pay code on the Wages screen in the Employee File. Reminder, only the credit hours for courses listed on the Education screen in the Employee File with the Count Toward Education Level field selected and the Degree field <u>blank</u> will be included in the total of additional credit hours when placing an employee in the appropriate lane on a particular package (when calculating the FTE - Hours table). If an employee would happen to match multiple lanes based on the criteria entered here (for example, from having multiple degrees), the employee is placed in the greatest lane.

7. Click the **Save** button.
8. Repeat Steps 4-7 until all the lanes have been completed for the particular package.

<u>Changing Negotiation Lanes</u>:
1. From the Human Resources screen, select the **Maintenance** menu and then **Negotiation Lanes**.
2. At the Negotiation Lanes screen, enter the ID of the package defined in Negotiations which contains the lane to edit in the Package ID field. If the ID is not known, click the **down-arrow** button to select the correct one.
3. Enter the ID of the lane to edit in the Lane ID field. If the ID is not known, click the **down-arrow** button or the **Find** button to select the correct one.
4. The description for the selected lane will appear in the Lane Description field, and can be changed if desired. If the description is changed, the change will also be reflected in Negotiations.

Note: The description can be up to **24** characters long, <u>not</u> including the lane number and brackets. If the brackets and number are deleted, the system will automatically add them back in and truncate the description to **24** characters (if **25** or more characters were entered).

5. Make the desired changes to the lane.
a. To add a degree or position title to the Degrees List or Position Titles List, complete the blank line (indicated with an asterisk) at the bottom of the list.
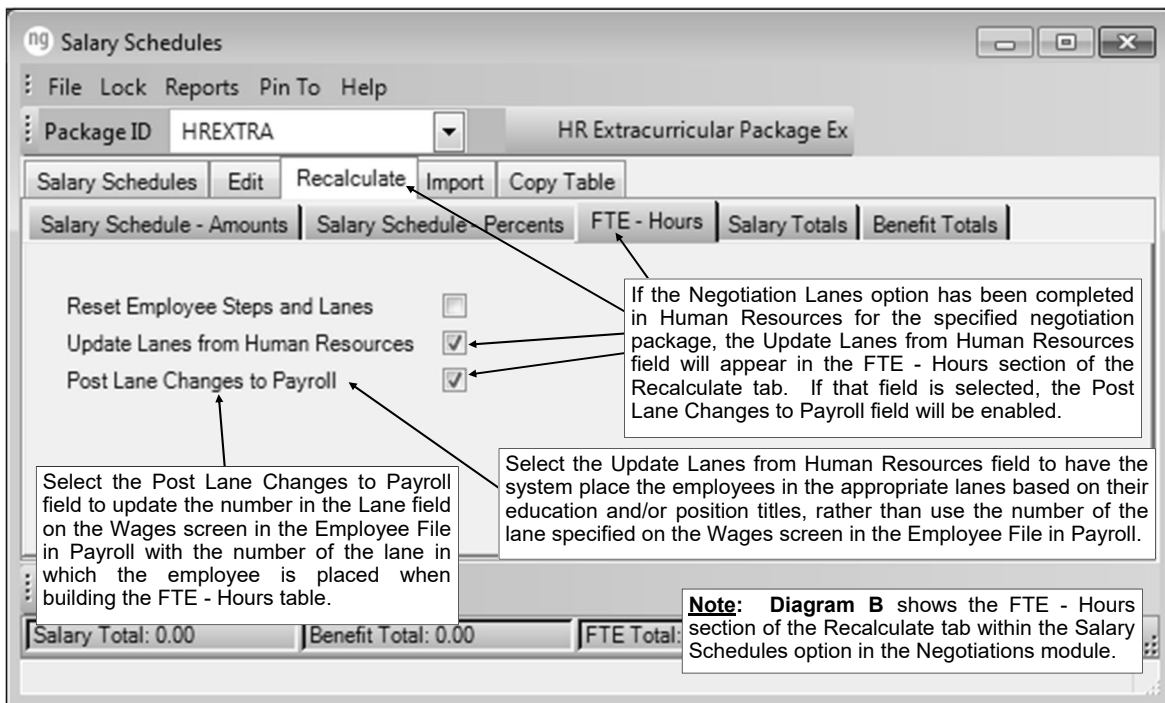
Diagram B

b. To remove a degree or position title from the Degrees List or Position Titles List, click the **Delete** button located to the left of the desired item in the list; when prompted to delete the record, click **Yes**.

   Note: An employee will be placed in the specified lane if: 1) the employee has the degree (or degree type) and number of continuing education credits (if applicable) on the Education screen in the Employee File matching one listed under the Degrees List; or 2) the employee has a position on the Positions screen in the Employee File with a corresponding position title matching one listed under the Position Titles List <u>and</u> the Position Title ID field completed with that position title for the employee's pay code on the Wages screen in the Employee File. Reminder, only the credit hours for courses listed on the Education screen in the Employee File with the Count Toward Education Level field selected and the Degree field <u>blank</u> will be included in the total of additional credit hours when placing an employee in the appropriate lane on a particular package (when calculating the FTE - Hours table). If an employee would happen to match multiple lanes based on the criteria entered here (for example, from having multiple degrees), the employee is placed in the greatest lane.

6. After all the changes have been made, click the **Save** button.
7. Repeat Steps 3-6 until all the lanes have been changed for the particular package.