CHARTER SCHOOL DOE SURVEY STAFF REPORTING TRAINING MANUAL— SURVEY 2

Palm Beach County School District—HRIM Team

DOE - Survey 2

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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Key Points to Remember

1. **BEFORE** entering information in the Survey pages, run the **CHT_CAE_STAFF_LISTING_BY_DEPT** query to ensure that only your current staff is listed.

   A. Terminate staff no longer working at your school.
   B. Enter staff working at your school that are not listed.*
   (**You must have a completed Charter Authorization form*.)

2. **AFTER** entering information in the Survey pages, run the following queries to ensure all the information has been entered correctly:

   A. **CHT_DOESRVY_EVAL_CONTRACT** (Contract information for Teachers, Principals and Assistant Principals)

   B. **CHT_DOESRVY_SUPPLEMENTS** (The Annual monetary value of the supplement. Not the Per Paycheck amount unless it is the full annual amount.)

   C. **CHT_DOESRVY_BENEFITS*** (Employer-paid amount that appears on the paycheck closest to the Survey date.)

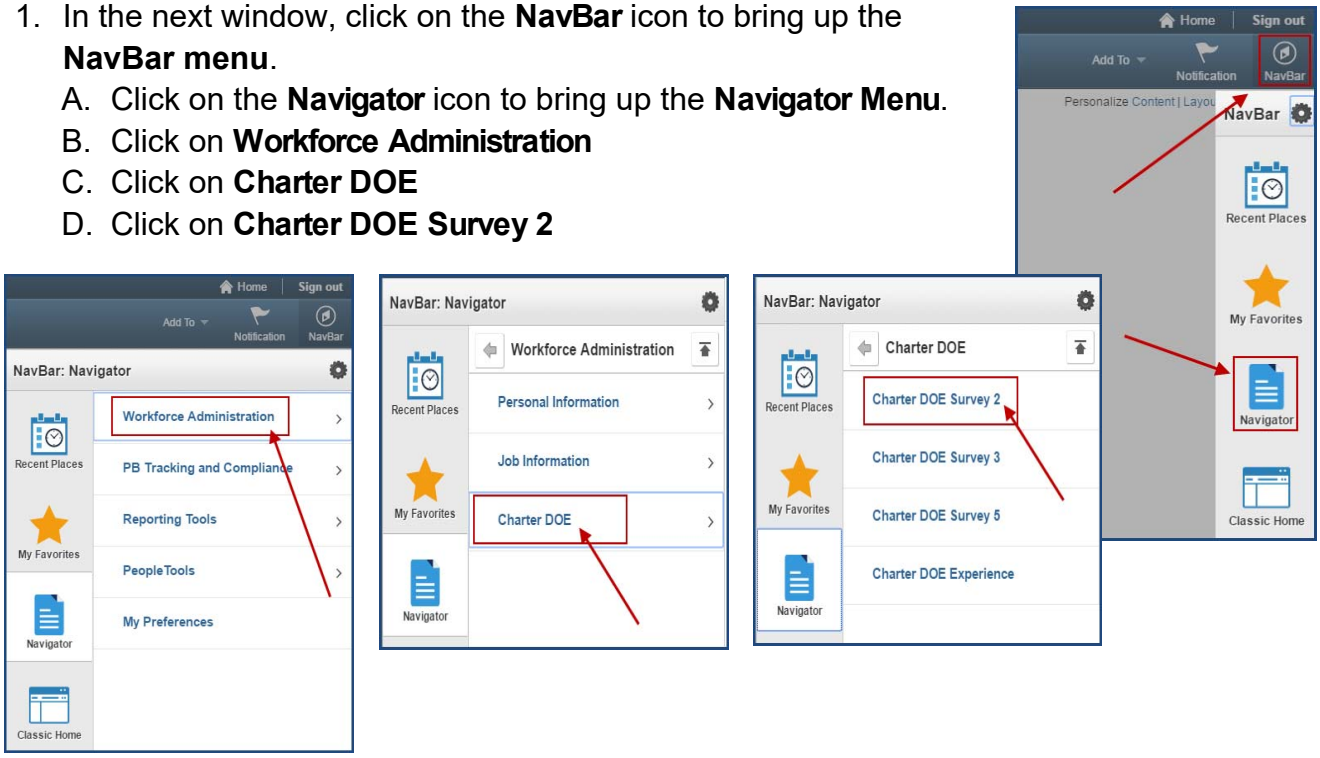
Check for "high" amounts and verify that they are per paycheck amounts, not YTD or full year.

   D. **CHT_CAE_TCHRS_YRS_OF_EXP** (Ensure that Teaching/Admin experience has been entered for newly hired teachers/APs/Principals who did not have the information entered with the Job Creation process.)

DOE Survey Staff Reporting
Survey 2 (October)

In PeopleSoft, click on the **Human Capital Management** tile.

1. In the next window, click on the **NavBar** icon to bring up the **NavBar menu**.
   A. Click on the **Navigator** icon to bring up the **Navigator Menu**.
   B. Click on **Workforce Administration**
   C. Click on **Charter DOE**
   D. Click on **Charter DOE Survey 2**

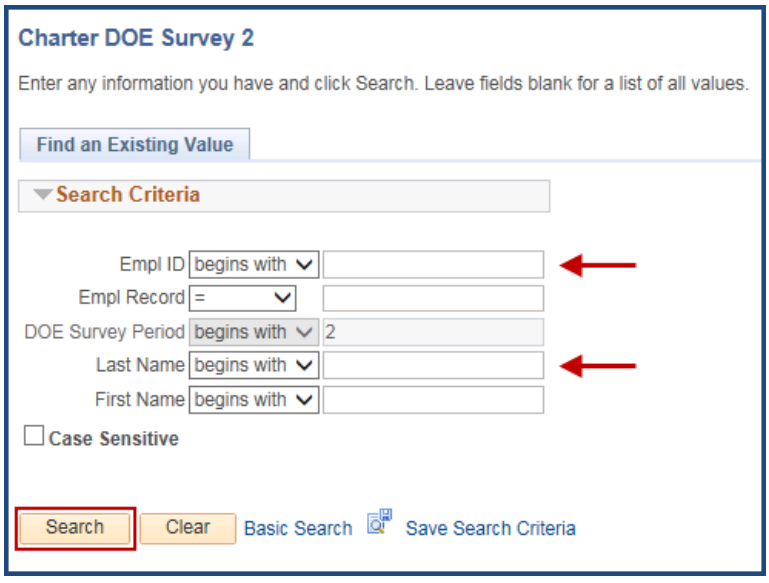


The **Charter DOE Survey 2** search page will display.

2. Enter the Employee ID number in the **Empl ID** field OR enter the employee's last name in the **Last Name** field.

TIP: If the employee has more than one job at your school, complete these pages for each job.

3. Click the **Search** button.



Charter DOE Survey 2 pages

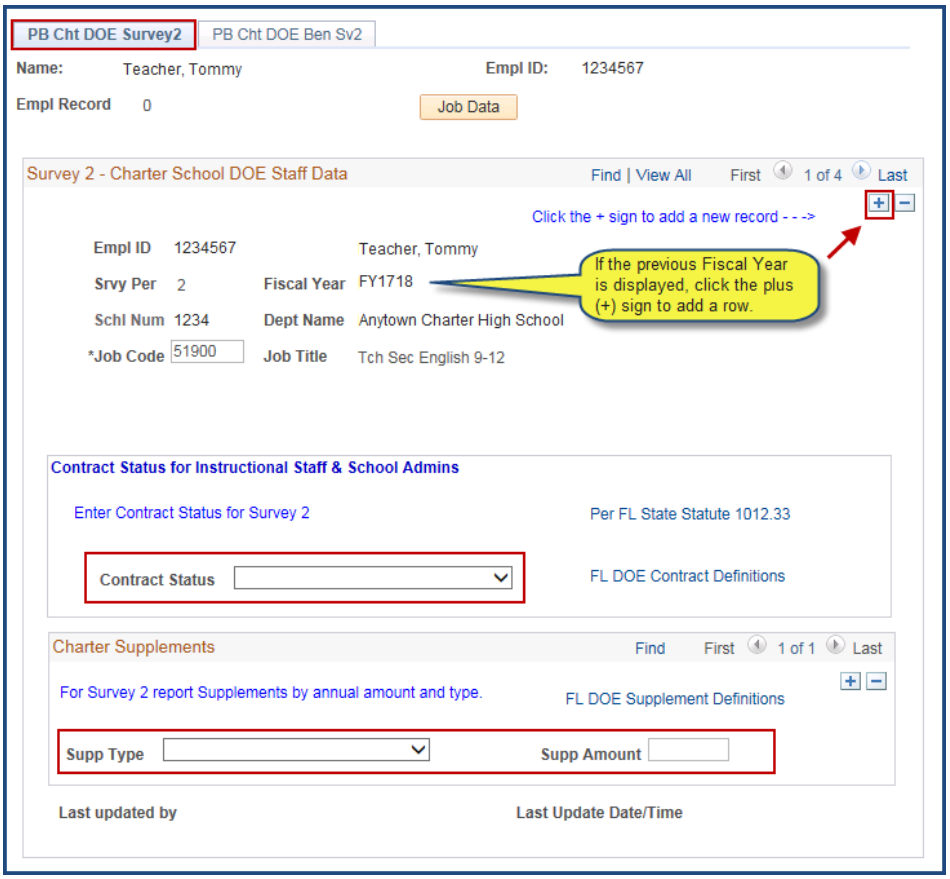
The Charter DOE Survey 2 pages will display with two tabs:

- **PB Cht DOE Survey2**
- **PB Cht DOE Ben Sv2**

(*Please note: The Teaching Experience page is a "stand-alone" page in the Charter Survey menu and is no longer included with the individual Surveys. All teaching experience for newly hired Teachers or School Administrators must be entered on the Charter DOE Experience page*).

Charter School DOE Staff Data section:

1. While on the first tab (PB Cht DOESurvey2), click on the "**+**" sign to add a new row for the new Fiscal Year for existing employees. (New employees should already have the new Fiscal Year displayed).



There are two sections on this page where you will enter information, if applicable.

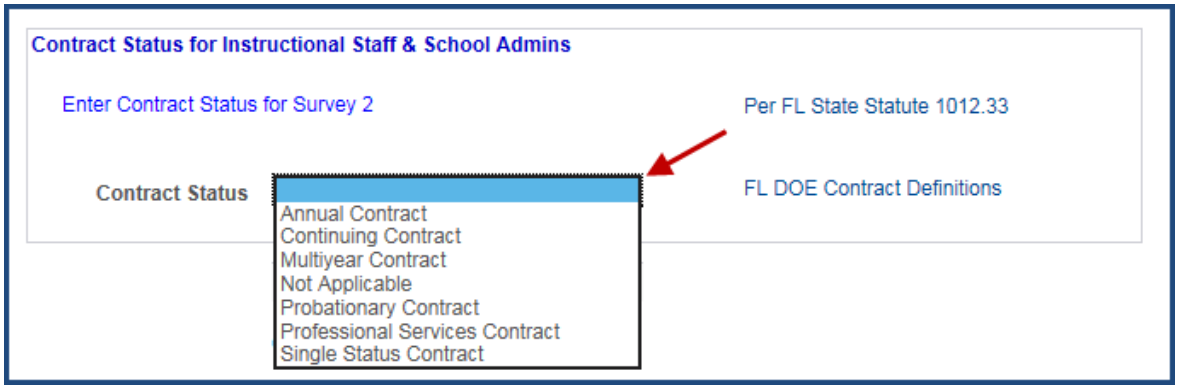
- **Contract Status**
- **Charter Supplements**

Each section has a dropdown menu to choose from. The ***Contract Section*** is only for Instructional Employee and School Administrator information. The ***Supplement Section*** includes a field to input the Annual supplement amount. (DO NOT enter per paycheck amount unless it is the full amount for the year.)

Contract Status section:

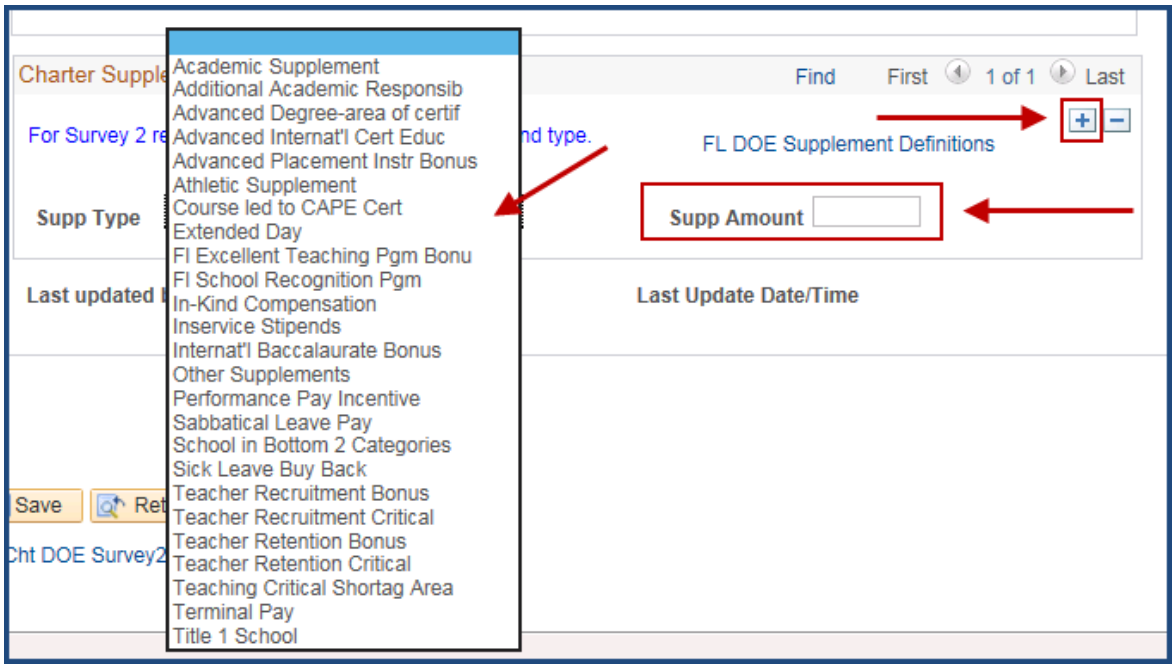
2. Click the **dropdown arrow** to select the ***Instructional*** or ***School Administrative*** employee's current fiscal year contract status, as per the **Student Success Act, F.S. 1012.34**.

TIP: If the employee is new to your school this year, they will be on a **Probationary** contract.



Charter Supplements section:

3. Enter all employee supplement types and the projected **Annual** amount(s). Do not enter a per paycheck amount unless it is the total amount for the year for that supplement. Click the "**+**" to add additional supplements.



4. Once all information has been entered, click **SAVE** at the bottom of the page.

Charter DOE Benefits page

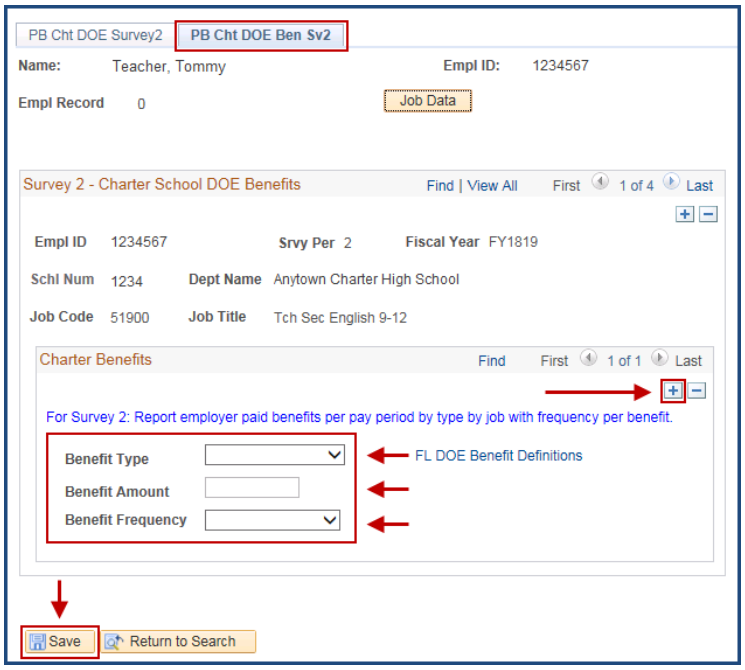
1. Click on the **PB Cht DOE Ben Sv2** tab.

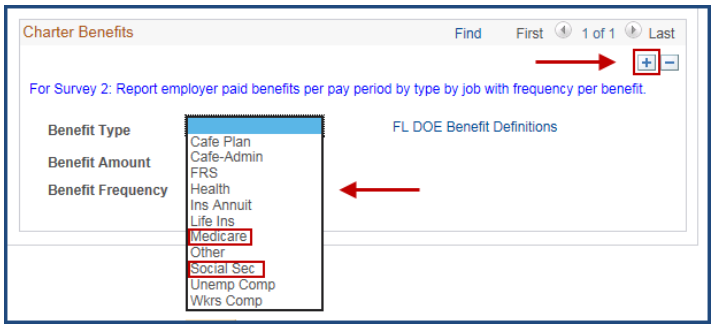
2. Enter the EMPLOYER-PAID benefits for the employee in the Charter Benefits Section:
   - Benefit Type
   - Benefit Amount
   - Benefit Frequency

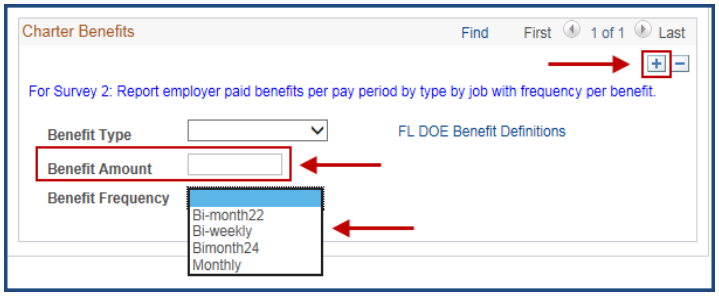
   (*Please note: <u>You must have at least</u> Social Security and Medicare for each paid employee*.)

3. Click the "**+**" to enter additional benefits.

4. Once all information has been entered, click **SAVE**.



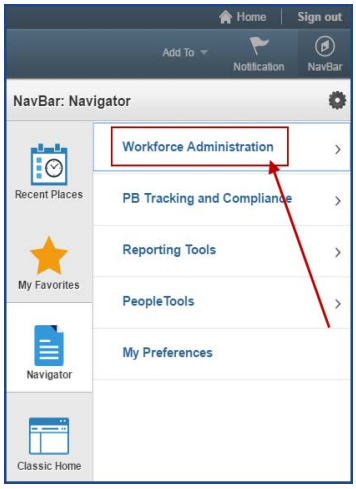


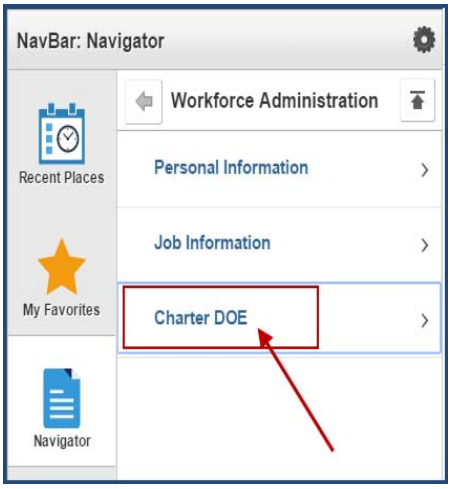


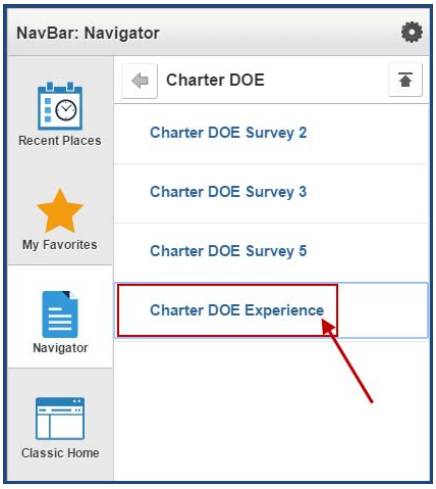
Charter DOE Experience page

You will need to return to the Main Menu to choose the Charter DOE Experience page. This page is not included with the individual Survey Period pages.

This information must be entered* for each new Instructional Employee or School Administrator hired within the Fiscal Year. (Note: The information will only need to be entered one time. The system will update, automatically, each year).
***If the information has been added as a part of the Job Creation process in PeopleSoft, you do not need to enter it during the Survey Periods.**



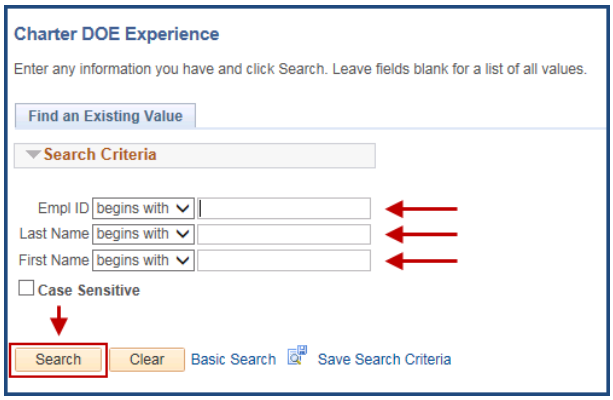




From the **Navigator Menu**

1. Click on **Workforce Administration**
2. Click on **Charter DOE**
3. Click on **Charter DOE Experience**

The **Charter DOE Experience** Search page will display.



4. Enter the *Employee ID number* in the **Empl ID** field OR enter the *employee's last name* in the **Last Name** field.

5. Click the **Search** button.

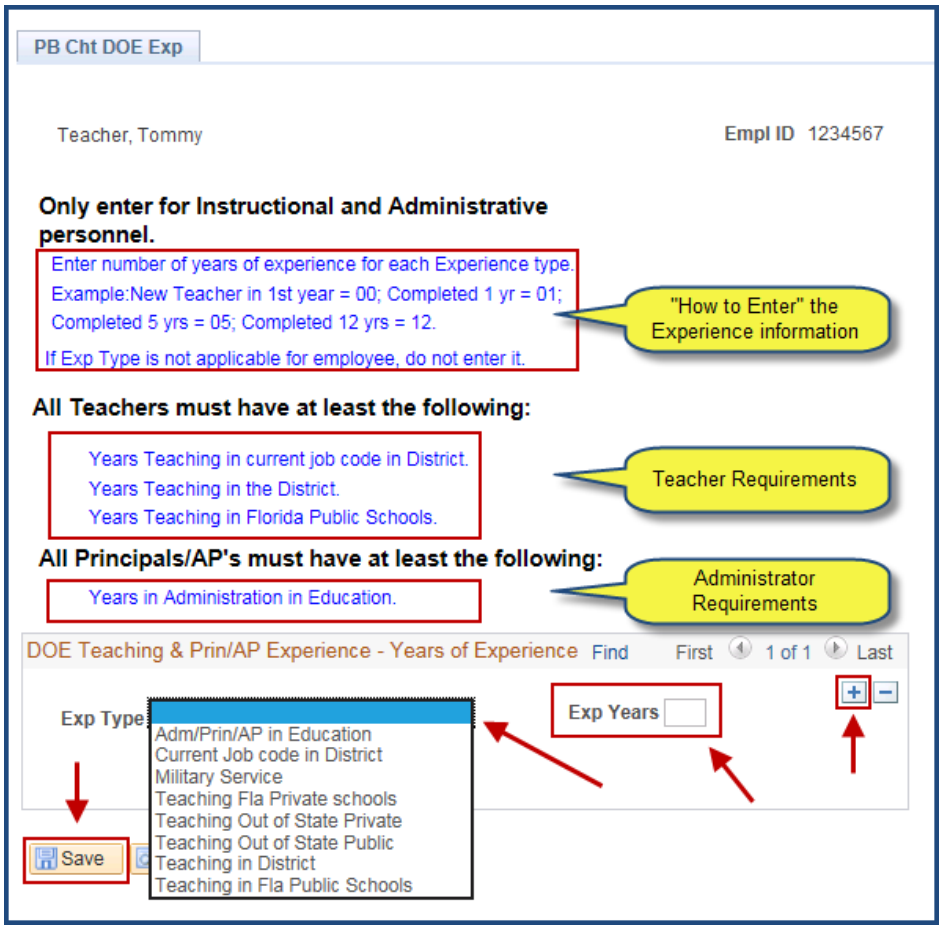
Charter DOE Experience page

Once the **PB Cht DOE Exp** page appears, you will need to enter the experience information for any new Instructional or School Administrative employees for the current fiscal year who have not had the information previously entered. (NOTE: Once you have entered the information, you will NOT NEED to update it in other Survey Periods. The system will update the information each year.)

1. Enter the complete information for each new employee.
2. Click on the "**+**" to add each additional experience type. (Three types required for teachers.)
3. Click **SAVE**.

For **Instructional** employees, the following information MUST be entered:

- Years Teaching in Current Job Code in District
- Years Teaching in the District
- Years Teaching in Florida Public Schools (Includes Charter. Excludes Private.)
  Note: Years Teaching in Florida Public Schools must be EQUAL TO or GREATER THAN Years Teaching in the District.

For **Principals/AP's**, the following information MUST be entered:

- Years in Administration in Education