



CHARTER SCHOOL DOE SURVEY STAFF REPORTING TRAINING MANUAL— SURVEY 5

Palm Beach County School District—HRIM Team

DOE - Staff Survey 5

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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TABLE OF CONTENTS

TABLE OF CONTENTS	
Overview	3
PB Charter DOE Employee Search	4
PB Charter DOE Staff Data	5
PB Charter DOE Fiscal Year Earnings	6
PB Charter DOE Instructional/Admin Evaluation	6 - 7
PB Charter DOE Salary Supplements	8
PB Charter DOE Benefits	9
PB Charter DOE Attendance	10
PB Charter DOE Experience	11 - 12

Key Points to Remember

1. Request **Payroll reports** showing the following Information for the fiscal year:
 - Total Salary paid for the fiscal year
 - Total Employer-paid supplements for the fiscal year
 - Total Employer-paid benefits for the fiscal year
 - All Employee attendance information for the fiscal year
2. Request **Accounting reports** for total payment made for the year to agencies on behalf of contracted services personnel (SLP's, OT/PT's, etc.).
3. **BEFORE** entering information in the Survey pages, run the following queries to ensure that you have accounted for all of your staff:
 - **CHT_CAE_STAFF_LISTING_BY_DEPT** - To ensure that only your current staff is listed. Terminate staff in PeopleSoft who are no longer there. Enter jobs for staff working, but not listed (must have completed Charter Authorization form).
 - **CHT_TERMED_EMPLOYEES** - To get a list of employees you have terminated* this fiscal year. (*Note: If the employee was later hired by the District, they will not show up on this list. You will need to contact HRIM to have the data input.)
4. **AFTER** entering information in the Survey pages, run the following queries to ensure all the information has been entered correctly:
 - **CHT_DOESRVY_EVAL_CONTRACT** (Evaluation information for Teachers, Principals and Assistant Principals)
 - **CHT_DOESRVY_FY_SALARY**
 - **CHT_DOESRVY_SUPPLEMENTS**
 - **CHT_DOESRVY_BENEFITS** (*Must have at least Medicare/Social Security*)

DOE Staff Survey 5 (July)

DOE Staff Survey 5 Information

There are different sections within the DOE Survey 5 pages available for input. Information does not need to be entered into every section for every employee. Some sections are only for specific groups of employees. It is important to only enter information in the appropriate section for the applicable **Employee Group**. Additionally, if you have employees at two different schools, you will need to complete these pages for each job, for each school. ALWAYS start with a new Search page for the Second job.

Please see the chart below to determine which sections are required for which employees.

Employee Group	Fiscal Year Earnings	Instructional Staff & School Admin Evaluation	Supplements	Benefits (At least Social Security and Medicare)	Days Worked	Student Contact Days
Admin (Prin/Asst Prin)	Yes	Yes**	If received	Yes	Yes	Yes
Teachers	Yes	Yes**	If received	Yes	Yes	Yes
Non-Instructional	Yes	No**	If received	Yes	Yes	No
Substitutes	Yes	No**	If received	Yes	Yes	No
Contracted Svcs (SLP/OT/PT)	Yes*	No**	No	No	Yes	No

*Fiscal Year Earnings amount for Contracted Services Personnel is the total amount paid to the agency for the person's services for the year.

An Evaluation Code must be chosen or the Survey information will not save. For Non-Instructional employees, choose **Not an Instructional Staff. For Contracted Services personnel, choose **InstStaff Not Required to eval**. For Instructional personnel for whom you are awaiting VAM scores, choose **InstStaff Required Not evaluated**.

Instructional Staff & School Administrators Evaluation Section

It is the responsibility of the Charter School to have the information necessary for the Evaluation Section of the DOE Staff Survey 5 pages. If the Charter School has questions regarding the information required in this section, they should contact the District's Charter Department or their State DOE contact person. The HRIM Team can assist with how the information is input and the percentage ranges, but does not have information regarding how each Charter School evaluates their personnel.

There are links to the Florida State Statute 1012.34 regarding **Personnel Evaluation and Procedures** and links to the **DOE Personnel Evaluation Definitions** within the DOE Staff Survey 5 pages, in the Evaluation section.

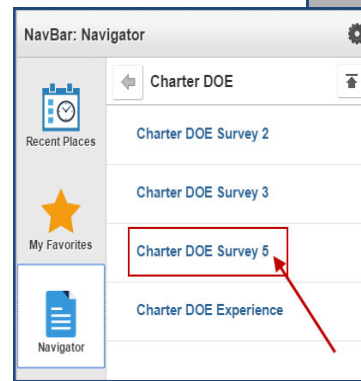
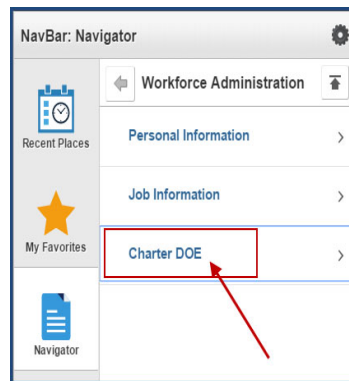
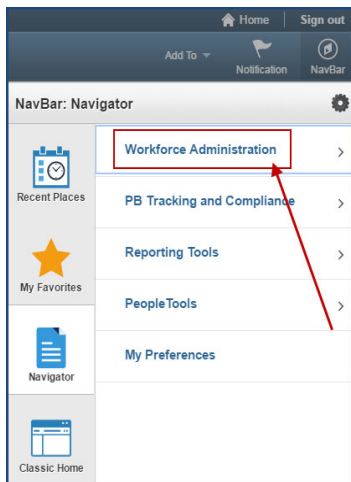
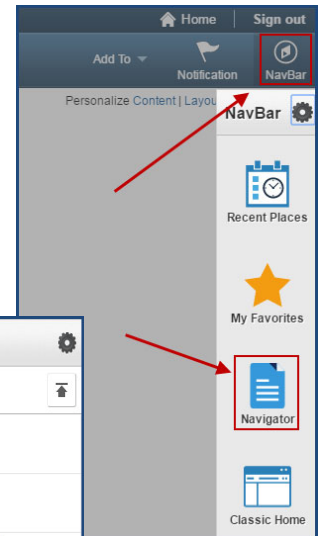
PRIOR to entering any survey information, you must ensure that all staff who no longer work for your school have been terminated in PeopleSoft. You will also need to ensure that all staff currently at your school are in PeopleSoft. (You will need an approved Charter Authorization form before entering their job in PeopleSoft.)

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**.

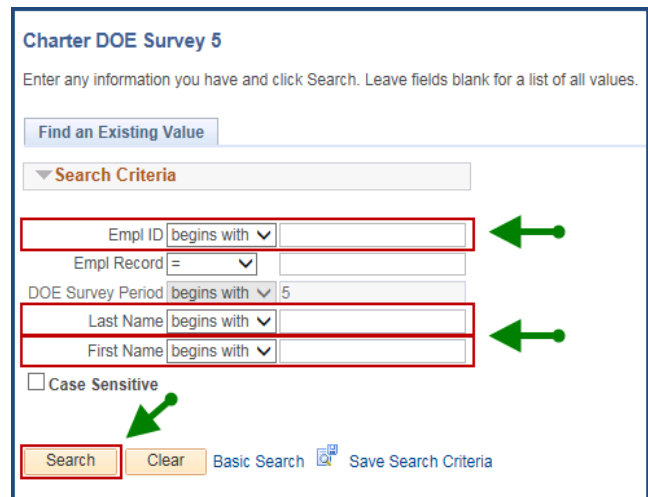
- A. Click on the **Navigator** icon to bring up the **Navigator Menu**.
- B. Click on **Workforce Administration**
- C. Click on **Charter DOE**
- D. Click on **Charter DOE Survey 5**



The **Charter DOE Survey 5 Search** screen will display.

TIP: If the employee has more than one job at your school, complete these pages for each job. **ALWAYS SEARCH FROM A NEW SEARCH PAGE FOR THE SECOND JOB.**

- 2. There are three (3) ways to search for an employee (choose one):
 - A) By entering the employee ID in the **Empl ID** field, or
 - B) By entering the **Last Name, First** in the Name field, or
 - C) By entering the **Last Name, only**, in the **Last Name** field
- 3. Click the **Search** button.



Charter DOE Survey 5 pages

The Charter DOE Survey 5 pages will display with three tabs:

- **PB Cht DOE Survey5**
- **PB Cht DOE Ben Sv5**
- **PB Cht DOE Oth Sv5**

(Please note: The Charter DOE Experience page is now a “stand-alone” page in the Charter DOE PeopleSoft 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:

While on the first tab (PB Cht DOE Survey5), for employees who have a prior fiscal year survey row, click on the “+” sign to add a new row for the new Fiscal Year. (New employees should already have the new Fiscal Year displayed.)

Note: For employees with more than one job at your school, you will need to enter the information for each job.

The screenshot displays the 'Survey 5 - Charter School DOE Staff Data' form. At the top, there are three tabs: 'PB Cht DOE Survey5', 'PB Cht DOE Ben Sv5', and 'PB Cht DOE Oth Sv5'. The 'PB Cht DOE Survey5' tab is selected. The form shows the following information:

- Name: Teacher, Tommy
- Empl ID: 1234567
- Empl Record: 0
- Job Data button

The main form area contains the following fields:

- Empl ID: 1234567
- Teacher, Tommy
- Svvy Per: 5
- Fiscal Year: FY1718 (highlighted with a red box)
- *Schl Num: 1234
- Dept Name: ABC Charter High School
- *Job Code: 51900
- Job Title: Tch Sec English 9-12

In the top right corner of the form, there is a '+ -' button. A red arrow points to the '+' sign, with the text 'Click the + sign to add a new record -->' next to it.

Below the main form area, there is a section for 'Fiscal Year Earnings' with the following text: 'The actual earnings paid the empl by job code for the Fiscal year. An employee may have more than one job with earnings.' There is an input field for 'FY Earnings'.

Below that is the 'Instructional Staff & School Administrators Evaluation' section. It includes the following text: 'Instructional Staff & School Admins must have an Evaluation code plus the following 2-Digit Percentage Components for Survey 5 Per FL State Statute 1012.34'. There are several checkboxes and dropdown menus for selecting evaluation components.

At the bottom of the form, there is a section for 'Survey 5 - Charter Fiscal Year Supplements'. It includes the following text: 'For Sv 5: Report total employer paid supplements/bonuses by type. FL DOE Supplement Definitions'. There is a dropdown menu for 'Supp Type' and an input field for 'Supp Amount'.

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

- **Fiscal Year Earnings**
- **Instructional Staff & School Administrators Evaluation**
- **Charter Fiscal Year Supplements**


Fiscal Year Earnings

Enter the actual earnings paid to the employee, by job code, for the fiscal year in the **FY Earnings** field. An employee may have more than one job with earnings. You will need to enter the earnings for each job. If the employee is a contracted services person, such as an SLP or an OT/PT, and an agency is paid for their services, you will need to get the total amount paid to the agency for the fiscal year for the person's services during that time. This information can be obtained from your accounting department. Enter that amount in the **FY Earnings** field.

Fiscal Year Earnings

The actual earnings paid the empl by job code for the Fiscal year.
An employee may have more than one job with earnings.

FY Earnings



Instructional Staff & School Administrators Evaluation

For Instructional Staff (Teachers) & School Administrators (Principals/Assistant Principals), the following information must be input. (Note: The Principal should have this information).



- Evaluation code
- 2-Digit Percentage for each applicable Component
- Measures for Student Learning Growth

Instructional Staff & School Administrators Evaluation

Instructional Staff & School Admins must have an Evaluation code plus the following 2-Digit Percentage Components for Survey 5

Per FL State Statute 1012.34

Evaluation Code



Instructional Leadership Component - Admins <i>(Range 33-67)</i> Instructional Leadership Comp Defn	<input type="checkbox"/>	Professional & Job Responsibilities Component - Both <i>(Range 00-33)</i> Professional and Job Responsibilities Comp Defn	<input type="checkbox"/>
Instructional Practice Component - Teachers <i>(Range 33-67)</i> Instructional Practice Comp Defn	<input type="checkbox"/>	Student Learning Growth Component - Both <i>(Range 33-67)</i> Student Learning Growth Comp Defn	<input type="checkbox"/>
Measures of Student Learning Growth - Both Student Learning Growth Codes		<input type="text"/>	<input type="text"/>

Evaluation Code

NEW - For Non-Instructional employees and Contracted Services personnel:

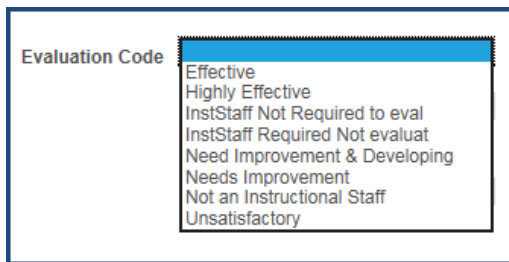
For Non-Instructional Staff, you must choose **Not an Instructional Staff** from the dropdown menu. For Contracted Services Personnel, choose **InstrStaff Not Required to eval**. (You will not need to fill in any other fields in the Evaluation section.)

NOTE: You will be unable to save the information if this step is not completed.

For Instructional employees, Principals, and Assistant Principals:

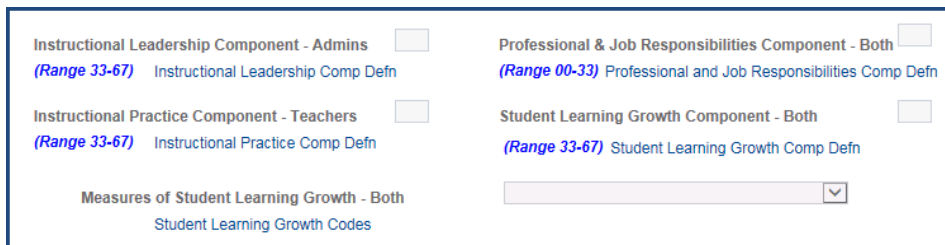
You must choose information or enter information for each section, below. If you do not enter the information, you will receive an error message and will not be able to save the information. Additionally, the fields for the **2-Digit Percentages** section will not be available for input until you choose an **Evaluation Code** in the prior section.

1. Choose an **Evaluation Code** from the dropdown menu.



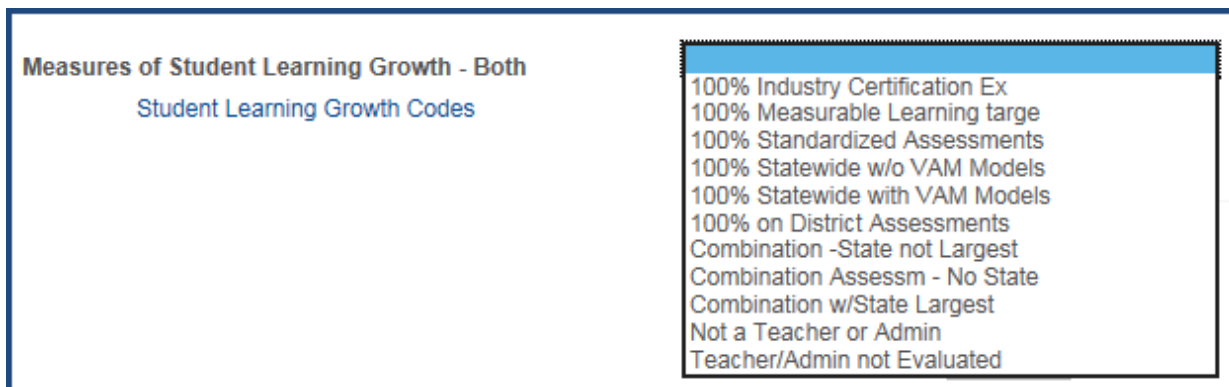
The screenshot shows a dropdown menu for 'Evaluation Code'. The menu is open, displaying the following options: Effective, Highly Effective, InstrStaff Not Required to eval, InstrStaff Required Not evaluat, Need Improvement & Developing, Needs Improvement, Not an Instructional Staff, and Unsatisfactory. The 'Effective' option is currently selected and highlighted in blue.

2. Enter the **2-Digit percentage** in the applicable components fields. The range information for the percentages is listed under each item. You cannot enter a percentage outside of the range. (Please note: There are links to the DOE documents under each item.)



The screenshot shows a form with several components, each with a checkbox and a range: 'Instructional Leadership Component - Admins' (Range 33-67), 'Professional & Job Responsibilities Component - Both' (Range 00-33), 'Instructional Practice Component - Teachers' (Range 33-67), and 'Student Learning Growth Component - Both' (Range 33-67). Below these is a dropdown menu for 'Measures of Student Learning Growth - Both' with the text 'Student Learning Growth Codes' below it.

3. Choose the **Measures of Student Learning Growth** from the dropdown menu.



The screenshot shows a dropdown menu for 'Measures of Student Learning Growth - Both'. The menu is open, displaying the following options: 100% Industry Certification Ex, 100% Measurable Learning target, 100% Standardized Assessments, 100% Statewide w/o VAM Models, 100% Statewide with VAM Models, 100% on District Assessments, Combination -State not Largest, Combination Assessm - No State, Combination w/State Largest, Not a Teacher or Admin, and Teacher/Admin not Evaluated. The '100% Industry Certification Ex' option is currently selected and highlighted in blue.

Charter Fiscal Year Supplements section:

- Enter all employee supplement types and amount(s) paid for the year for each employee/ job, if applicable. Click the “+” to add additional supplements.

Academic Supplement
 Additional Academic Responsib
 Advanced Degree-area of certif
 Advanced Internat'l Cert Educ
 Advanced Placement Instr Bonus
 Athletic Supplement
 Course led to CAPE Cert
 Extended Day
 FI Excellent Teaching Pgm Bonu
 FI School Recognition Pgm
 In-Kind Compensation
 Inservice Stipends
 Internat'l Baccalaureate Bonus
 Other Supplements
 Performance Pay Incentive
 Sabbatical Leave Pay
 School in Bottom 2 Categories
 Sick Leave Buy Back
 Teacher Recruitment Bonus
 Teacher Recruitment Critical
 Teacher Retention Bonus
 Teacher Retention Critical
 Teaching Critical Shortag Area
 Terminal Pay
 Title 1 School

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

Charter DOE Benefits page

1. Click on the **PB Cht DOE Ben Sv5** tab.
2. Enter the EMPLOYER - PAID benefits information (fiscal year total) for the employee in the **Charter School Benefits** section. You must have at least *Social Security* and *Medicare* information for each employee. (Exception: Contracted Employees such as SLP's for whom you pay an agency).

For each Benefit, you must enter the following items listed below:

- Benefit Type
 - Benefit Amount
3. Click the “+” to enter additional benefits.
 4. Once all information has been entered, click **SAVE**.

PB Cht DOE Survey5 | **PB Cht DOE Ben Sv5** | PB Cht DOE Oth Sv5

Name: Teacher, Tommy Empl ID: 1234567
Empl Record 0 Job Data

Survey 5 - Charter School DOE Benefits Find | View All First 1 of 3 Last

Empl ID 1234567 Srvy Per 5 Fiscal Year FY1718
Schl Num 1234 Dept Name ABC Charter High School
Job Code 51900 Job Title Tch Sec English 9-12

Survey 5 - Charter Fiscal Year Benefits Find First 1 of 1 Last

For Sv 5: Report total employer paid benefits by type by job.

Benefit Type FL DOE Benefit Definitions

Benefit Amount

Save Return to Search

Survey 5 - Charter Fiscal Year Benefits Find First 1 of 1 Last

For Sv 5: Report total employer paid benefits by type by job.

Benefit Type FL DOE Benefit Definitions

Benefit Amount

Charter DOE Staff Data Attendance page

1. Click on the **PB Cht DOE Oth Sv5** tab.
2. Enter all Personnel Days Worked.
3. Enter the Instructional Employee's Attendance for Student Contact Days. (Teachers, Principals and APs)
4. Click **SAVE** (bottom of page) when complete.

NOTE: The Title I and Migrant section is not used. Please leave blank.

PB Cht DOE Survey5 | PB Cht DOE Ben Sv5 | **PB Cht DOE Oth Sv5**

Name: Teacher, Tommy Empl ID: 1234567

Empl Record 0 Job Data

Survey 5 - Charter School DOE Staff Data Find | View All First 1 of 4 Last

Empl ID 1234567
Srvy Per 5 Fiscal Year FY1920
Schl Num 4012 Dept Name Somerset Academy Canyons Middle School
Job Code 51250 Job Title Tch Middle Math 6-8

Survey 5 Attendance & Migrant Data

The following Days Worked data is required for ALL Personnel

Days Worked Including Paid Holidays
Enter the actual number of days the employee in this job worked(including paid holidays).
Note: Needs to be greater than zero and not more than 265.

Days Worked

The following data is required in DOE Survey 5 for Instructional Personnel only.

Student Contact Days Present and Absent
Enter Days Absent/Present for Instructional Personnel.
Enter for Student Contact days. Total should not exceed 180.

Days Present Days Abs Sick Days Abs Pers
Days Abs TDE Days Abs Other Tot Stdt Days 180

Title 1 and Migrant

Employee who worked with a Title 1 School-wide program or a Title 1 Targeted Assistance Program and was paid from Title 1 Part A funds.

Title 1 School Wide Title1 SW Pct
Title 1 Targeted Assistance Title1 TA Pct

Employee who worked with the Migrant Program during the regular school year or Summer/Intersession Program and was paid from Title 1 Part B Migrant Education Program funds.

Migr Reg Sch Yr Migr Reg %
Migr Summer Migr Sum %

Last updated by Last Update Date/Time

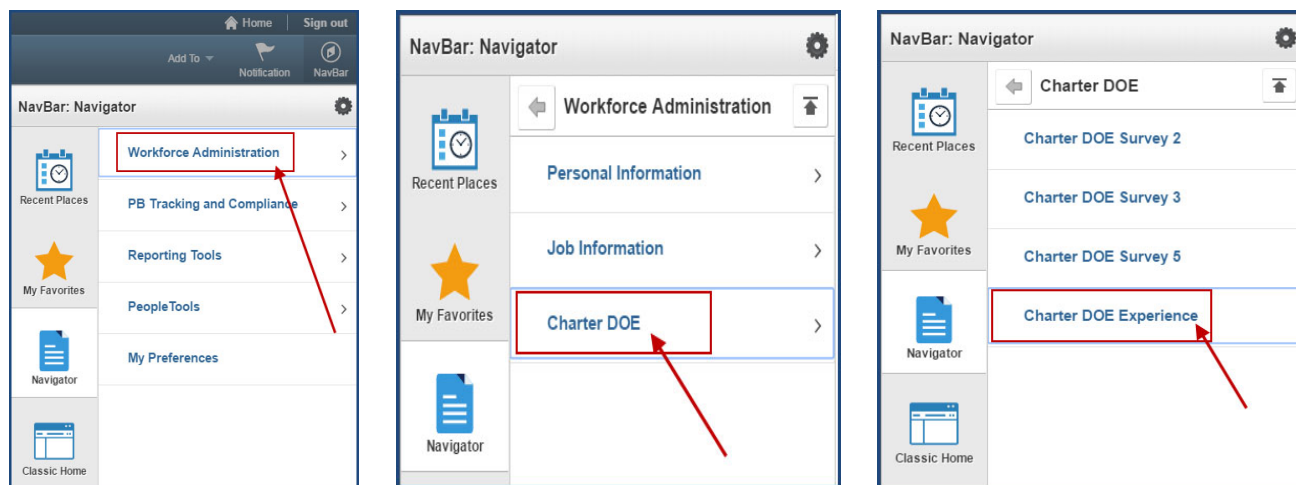
PB Cht DOE Survey5 | PB Cht DOE Ben Sv5 | PB Cht DOE Oth Sv5

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 if the information was not entered when the job was created in PeopleSoft. (Note: The information will only need to be entered one time. The system will update, automatically, each year).

NOTE: New Schools must enter the Experience information for all Teachers, Principals, and Assistant Principals.



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.

The screenshot shows the 'Charter DOE Experience' search page. It features a search criteria section with three dropdown menus for 'Empl ID begins with', 'Last Name begins with', and 'First Name begins with'. Red arrows point to the input fields for 'Empl ID' and 'Last Name'. Below these fields is a 'Case Sensitive' checkbox. At the bottom, there is a 'Search' button highlighted with a red box, along with 'Clear', 'Basic Search', and 'Save Search Criteria' options.

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

For new Instructional or Administrative employees with only one (1) job or job code with the school, the **PB Cht DOE Exp** page will appear. For new Instructional or Administrative employees with more than one job with the school or with jobs in multiple schools that you manage, the **Charter DOE Experience** page will display with a *Search Results* list showing the multiple jobs for the employee. **For the list, it does not matter which job you choose as the experience only needs to be entered one time.**

You will need to enter the required instructional or administrative experience information as noted on the page. (See requirements, below.) For teachers/administrators with “0” complete years for any of the categories, be sure to enter “00” before clicking SAVE. After the information has saved, the **Exp Years** field will look blank, but it is not. Once the system updates after the Fiscal Year is complete, the information will change to “1.”

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.

REQUIREMENTS

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.) **This number should be equal to or greater than the Years Teaching in the District information.**

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

- Years in Administration in Education
1. Enter the complete information for the new employee.
 2. Click on the “+” to add each additional experience types.
 3. Click **SAVE**.

The screenshot shows the 'PB Cht DOE Exp' form for 'Teacher, Tommy' (Empl ID 1234567). The form includes instructions for entering experience data. A yellow callout bubble points to the example text: 'Example: New Teacher in 1st year = 00; Completed 1 yr = 01; Completed 5 yrs = 05; Completed 12 yrs = 12.' Another yellow callout bubble points to the 'Exp Type' dropdown menu, which lists categories like 'Adm/Prin/AP in Education', 'Current Job code in District', 'Military Service', 'Teaching Fla Private schools', 'Teaching Out of State Private', 'Teaching Out of State Public', 'Teaching in District', and 'Teaching in Fla Public Schools'. A third yellow callout bubble points to the 'Exp Years' input field, which is currently empty. A red box highlights the 'Exp Years' field, and a red arrow points to the '+' button next to it. A red box also highlights the 'Save' button at the bottom left of the form. The form title is 'DOE Teaching & Prin/AP Experience - Years of Experience' and it shows '1 of 1' records.