CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

New Hire Process

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

3300 Forest Hill Blvd., Suite A-152

West Palm Beach, FL 33406

The PeopleSoft screens contain many fields. Only the fields mentioned in this manual, however, will need to be filled in. Filling in additional fields may cause errors.

IMPORTANT:

Be sure to "Tab" from field to field. DO NOT use the "Enter/Return" key. Using the "Enter/Return" key before the information is complete will "Save" the information at that point and you will not be able to finish filling out the rest of the fields.

Teaching Experience should be entered for new hires when creating the job.

If further assistance is needed, please contact the HRIM team in Human Resources via email: HRIM@palmbeachschools.org or via phone: 561.434.8331

New Hire Procedure: Job Data screens

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

2. In the next window, click on the **NavBar** icon to bring up the **NavBar menu**, then
   A. Click on the **Navigator** icon to bring up the **Navigator Menu**
   B. Click on **Workforce Administration**
   C. Click on **Job Information**
   D. Click on **Add Employment Instance**
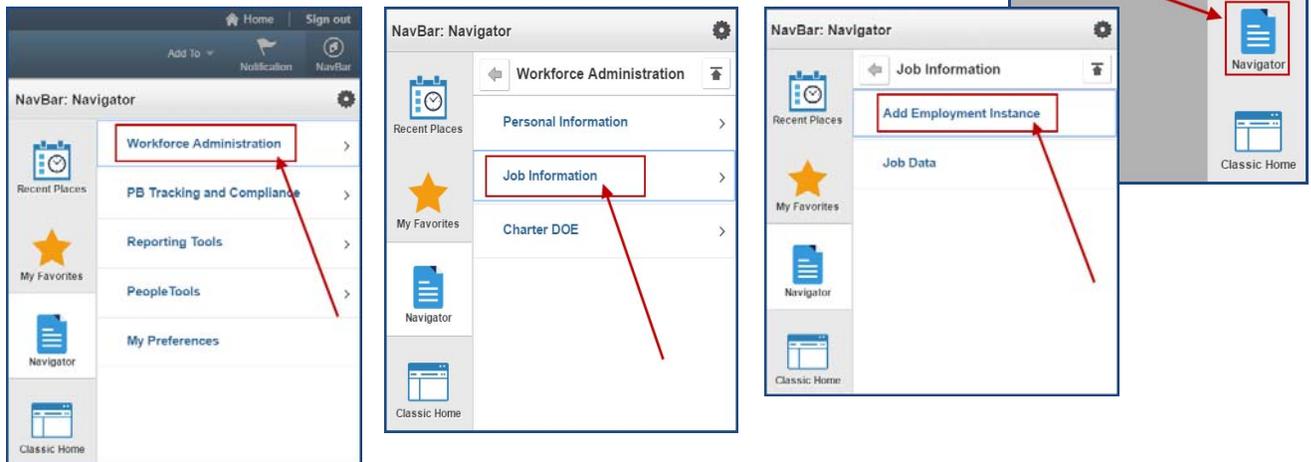
3. In the **Add Employment Instance** window, enter the employee ID number in the **Empl ID** field.

> **TIP:** *The Employee ID number will be listed on the completely "Signed Off" Charter School Authorization form. (All Sections must be complete).*

4. Click on the **Add Relationship** link.

Note: Do **not** enter any information in the **Empl Record** field.

5. In the **Effective Date** field, enter the employee's start date.
(*Cannot be prior to fingerprinting date*)

6. Click on the **Calculate Status and Dates** button.

> *TIP: In the Action field, the Action defaults to "Hire", but you must enter a Reason.*

7. In the **Reason** field, click the drop down arrow and select "**First Job**." (You must have a reason).

8. The **Job Indicator** field will display *Primary Job* **UNLESS** the person has another job in the District. If *Secondary Job* appears, the person has a District job in PeopleSoft - **do not change it to Primary**. The District HR Office monitors these screens. If it is determined that the person no longer works at the other location, your *Secondary* Job will be changed to *Primary*.

9. In the **Department** field, enter the school number and press **TAB**. The rest of the information will automatically populate in the fields.

10. Click on the **Job Information** tab.

11. In the **Job Code** field, click on the **magnifying glass** button.

12. Click on **Advanced Lookup**.

13. Click the **Description** drop down arrow, and choose *Contains* from the menu list.

14. Type the job title information into the **Description** field (example: **Math**).

15. Click the **Look Up** button.

16. Click on the **job title** link.

TIP: You may also look up Job Codes on the District's Job Description website.

While still on the **Job Information** tab (Note: _Tab_ to each field):

17. In the **Regular/Temporary** field, choose one. (Note: Subs are always _Temporary_)

18. In the **Full/Part** field, choose one (Note: Temps are always _Part-time_)

19. Click on the **Classified Ind:** drop down arrow. Select the appropriate job type description of the employee. _(Admin, Instr or NonInstr)_

20. In the **Standard Hours** field, enter the number of hours per week the employee will work. _(If TEMP or Sub, use "1")_

21. In the **Work Period** field, enter the number of _Duty Days_ the employee will work (if _Regular_) or enter "**W**" if they are _Temporary_.

22. In the **FTE** field, enter the FTE that correlates with the job type (**See FTE Chart**) and press **TAB**. _(If TEMP, FTE should be "zero")_

> **TIP: Standard Hours, Work Period** and **FTE** information **MUST** be input in the correct order (see below), or **FTE** will change to a default amount.

23. Click the **Job Labor** tab.

24. In the **Union Code** field, **DELETE** the data and press **TAB**.

25. Click the **Payroll** tab.

26. In the **Employee Type** field, click on the **magnifying glass** button.

27. Select the appropriate employee type: **Salaried** or **Hourly**.

28. Click the **Salary Plan** tab.
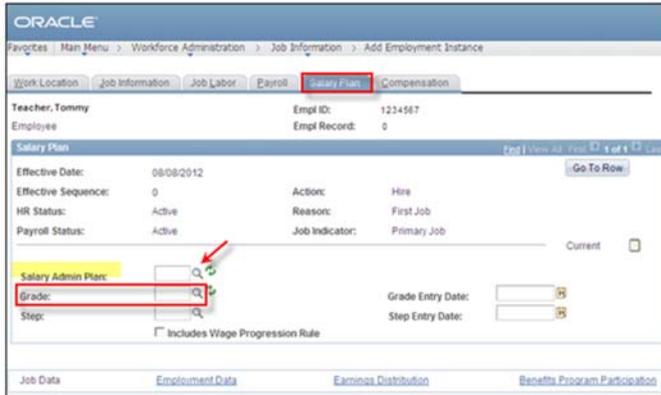
29. In the **Salary Administration Plan** field, click on the **magnifying glass** button.

30. Choose the appropriate Charter Schools **Salary Plan**:

| CHHR | Charter Schools Hourly Plan |
| CHSL | Charter Schools Salary Plan |

31. In the **Grade** field, Enter "**01**" and press **TAB**.

32. Click the **Compensation** tab.
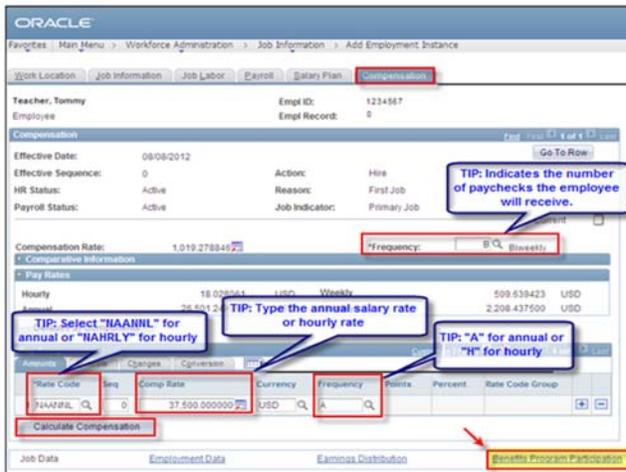
33. In the **Frequency** field, click on the **magnifying glass** button and select the appropriate code.

34. In the **Rate Code** field, click on the **magnifying glass** button and select the appropriate code.

35. In the **Comp Rate** field, type the annual salary rate *or* the hourly rate and press **TAB**.

36. In the **Frequency** field, depending on the information input into the **Rate Code** field either "A" for Annual **OR** "H" for Hourly will automatically populate into this field.

37. Click the **Calculate Compensation** button.

38. Click on the **Benefits Program Participation** link. (Bottom right corner of page)

Benefit Program Participation window

<div style="background:yellow">*IMPORTANT!!!*</div>

39. In the **Benefit Record Number** field, enter the number "**1**" then press **TAB**.

<div style="background:yellow">
WARNING: Do not use a "0."
"0" is for PBC DISTRICT Benefit Records. If you use a "0" and change the date,
you are removing District Benefit information connected to the employee's
previous job with the District..
</div>

40. In the **Benefit Program Participation** section (bottom of page):
A. If the current date is displaying, enter the Effective Date of employment (should match date at top). (*NOTE: If a date prior to the current date is already populated at the bottom after entering "1", __DO NOT CHANGE__ the date. It is from another Charter job and should not be changed.*)

B. Click on the **magnifying glass** button and select "**NOB**" (*SDPBC No Benefits BenPgm*) and then press **TAB**.

<div style="background:yellow">
NOTE: *If you are creating a job for the employee at more than one school, there MUST BE a Benefit Record FOR EACH JOB.*
</div>

41. Click the **Apply** button. (*NOT* the **OK** button).

<div style="background:yellow">
TIP: *You will get several error messages. Click the OK button for all.*
</div>

Charter DOE Experience

The Charter DOE Experience pages are now open all year. It is suggested that the experience information be entered into PeopleSoft for all new instructional or administrative employees at the time of job creation in PeopleSoft. This information will only need to be entered one time for the employee as the system will automatically update the information each year.
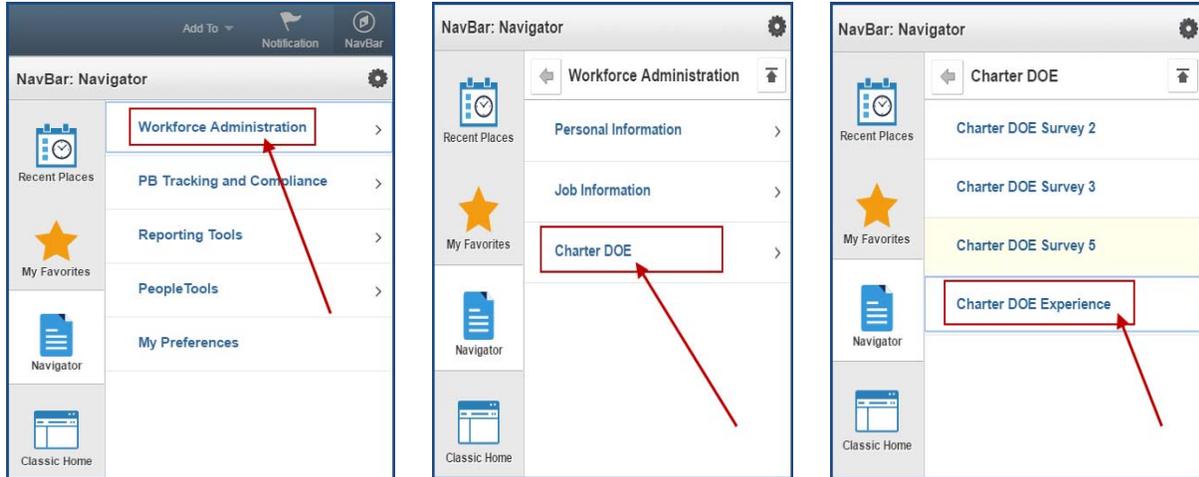
To get to the Charter DOE Experience pages:

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

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" 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 <u>MUST</u> 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.) **<u>This number should be equal to or greater than the *Years Teaching in the District* information</u>.**

For Principals/AP's, the following information <u>MUST</u> 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**.