



# CHARTER SCHOOLS - END OF YEAR

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*Palm Beach County School District - HRIM Team*

## HR Processing

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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All Guides, Manuals, and Processing information needed to complete the processes can be found on the **Charter Schools HR Processing website.**

The HRIM Team is available to assist in answering questions about the PeopleSoft processes and can be reached by phone at 561-434-8331 or by email at [HRIM@palmbeachschools.org](mailto:HRIM@palmbeachschools.org).

For Certification questions, please contact the District Certification Analyst for your school.

# Overview

There are several end of year HR Processes for Charter Schools to complete. It is important that these processes are completed in a timely manner as they may impact DOE State Reporting for your school

## **DOE Survey 5**

**DOE Survey 5** is a full year summary of year to date information. The information required for DOE Survey 5 must be entered into the DOE Survey 5 pages in PeopleSoft by the deadline, each year.

## **HR Processing - End of Year (EOY)**

- **Terminations** - The Job Record for employees not returning to your school for the next fiscal year should be terminated, in PeopleSoft, in a timely manner.
- **Terminations (Certification)** -The Job Record for employees whose DOE Teaching Certificate expired or who did not meet Certification requirements by the deadline, will need to be terminated in PeopleSoft.
- **Job Changes** - The Job Record(s) for employees impacted by job changes (position changes, salary changes, etc.) should be updated in PeopleSoft with the Job Change information.
- **Incoming New Hires** - Ensure that the PBCSD Charter Onboarding Procedures are followed for all incoming new hires to your school for the new Fiscal Year.
  - Certification Pre-Clearance form (Teachers)
  - Charter School Authorization form (**top portion completed by the school**)
  - Personal Information form
  - Job Information form
  - Years of Experience form (Teachers, Assistant Principals, Principals)

# DOE Survey 5

All Charter Schools must enter the information below into the **DOE Survey 5** pages in PeopleSoft by the deadline, each year. **DOE Survey 5** is a full year summary of year to date information. Survey 5 Training resources are available on the **HR PeopleSoft for Charter Schools website**.

## **DOE Survey 5 Preparation**

- Run a Staff List prior to terminating staff in PeopleSoft who will not be returning in the Fall. (For DOE Survey 5 information.)
- Request Payroll Reports showing the following for each employee:
  - Total Salary paid for the fiscal year
  - Total Employer-paid Benefits for the fiscal year (Must have Social Security and Medicare)
  - Total Supplements paid for the fiscal year.
- Request Accounts Payable information showing the total paid for each Contracted Services person for the year.
- Gather Evaluation information for all Instructional and School Administrative Employees (Teachers, Assistant Principals, and Principals).
  - Evaluation Code (*Effective, Highly Effective, Needs Improvement, etc.*)
  - 2-Digit Percentage Components (For *Instructional Leadership Component-Admins, Instructional Practice Component-Teachers, Professional & Job Responsibilities Component-Both, Student Learning Growth Component-Both*).
  - Measures of Student Learning Growth - Both (*Example: 100% on Statewide Assessments, etc.*)
- Attendance information for all Personnel.
- DOE Experience information for any Instructional or School Administrative employee who worked at your school this year for whom the information was not previously entered in the Charter DOE Experience pages in PeopleSoft.

# HR Processing

End of Year (EOY) HR Processing includes Terminating employees who will not be returning the Fall, Terminating employees with Certification Issues, Updating Job Information for employees with Job changes, and Processing information for all employees who will be new to your school for the new Fiscal Year who are onboarding during End of Year Processing.

## **HR Processing**

- Terminate staff in PeopleSoft who will not be returning in the Fall.  
*(Note: Terminate **AFTER** you have run a current Staff List to identify all staff for the current Fiscal Year.)*
- Review the Certification Status\* for Instructional Employees for the items listed below.
  - Expired Certificates?
  - General Knowledge Test Completed?
- Review the Licensing Status\* for Employees working under a Department of Health License (SLPs, OT/PTs, etc.). Note: You do not need to review the Licensing Status for Contracted Services Personnel.

***\*Certification Termination Letters will be sent to the Charter Schools via Pony Mail by the end of July. Any employee whose Certificate or License has expired WILL NEED TO BE TERMINATED IN PEOPLESOFT or moved to a Non-Instructional position. They CAN NO LONGER be Teacher of Record.***

- Update the Job Record in PeopleSoft for any staff with the following:
  - Position change
  - Salary change
  - Hour change (example: from part-time to full-time)
- Ensure the PBCSD Charter Onboarding Process is followed for all new hires to your school for the new Fiscal Year. Processing information, Guides, Manuals, and Forms for this process can be found on the **Charter Schools HR Processing website**.