



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:

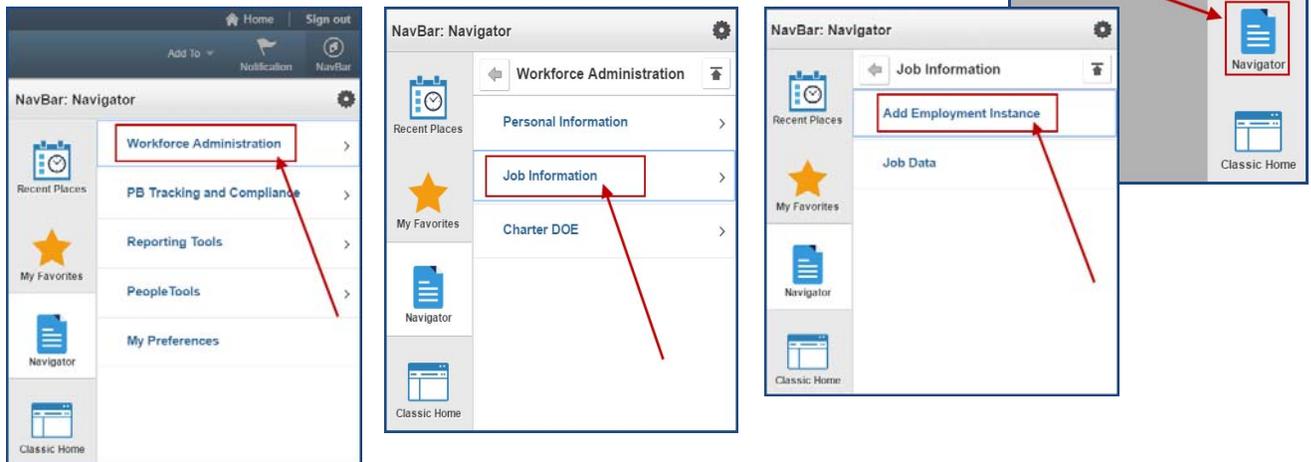
Be sure to “Tab” from field to field. DO NOT use the “Enter/Return” key. Using the “Enter/Return” key before the information is complete will “Save” the information at that point and you will not be able to finish filling out the rest of the fields.

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.

The screenshot shows the 'Add Employment Instance' form. The 'Empl ID' field is highlighted with a red box. Below it is the 'Empl Record' field with the value '0'. At the bottom, there is a red arrow pointing to the 'Add Relationship' link. A yellow note box contains the text: '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)

ORACLE
Favorites Main Menu > Workforce Administration > Job Information > Add Employment Instance

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Teacher, Tommy
Employee

Work Location

*Effective Date: 08/08/2012

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

*Action: Hire

Reason: First Job

*Job Indicator: Primary Job

Calculate Status and Dates

Position Number:

Position Entry Date:

*Regulatory Region: USA United States

*Company:

*Business Unit: SDPBC School Dist of Palm Beach Co

*Department:

Department Entry Date:

*Location:

Establishment ID:

Date Created: 08/08/2012

Last Start Date: 08/08/2012

Expected Job End Date:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Notify Refresh Add

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.

Teacher, Tommy
Employee

Empl ID: 1234567
Empl Record: 2

Job Information Find First 1 of 1 Last

Effective Date: 10/19/2015 [Go To Row](#)

Effective Sequence: 0 Action: Hire

HR Status: Active Reason:

Payroll Status: Active Job Indicator: Secondary Job

*Job Code:

Entry Date:

Supervisor Level:

Supervisor ID:

Reports To:

*Regular/Temporary: Regular

Empl Class:

*Regular Shift: N/A

Standard Hours

Standard Hours: 40.00

FTE: 0.000000

Combined Standard Hours: 40.00

Contract Number

Contract Number:

Contract Type:

USA

Job Data Employment Data

Look Up Job Code ? Help

Search by: Job Code begins with

Look Up Cancel **Advanced Lookup**

Search Results

Only the first 300 results can be displayed.

[View 100](#) First 1-300 of 300 Last

Look Up Job Code ? Help

SetID: SHARE

Job Code: begins with

Description: contains

Occupational Series: begins with

Official Position Title: begins with

Look Up Clear Cancel

Search Results

Only the first 300 results can be displayed.

Step 1: Click on the Look Up Icon to look up the Job Code.

Step 2: Click on Advanced Lookup

Step 3: Choose "Contains" Then enter a few of the letters of the job. Ex: Tch for Teacher; Elem for Elementary Then click Look Up.

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.

The screenshot displays the 'Job Information' tab for an employee named Tammi, Teacher. The job code is 51150 and the job description is 'Tch Middle English 6-8'. The 'Regular/Temporary' field is set to 'Regular' (highlighted with a yellow box and labeled '1'). The 'Full/Part' field is set to 'Full-Time' (highlighted with a yellow box and labeled '2'). The 'Classified Ind' field is 'Instructional 10 month 196' (highlighted with a yellow box and labeled '3'). The 'Standard Hours' field is 37.50, and the 'Work Period' field is 196. The 'FTE' field is 1.000000. A callout box notes: 'Duty Days in the Work Period field MUST match the number of days in the Classified Ind field. If the employee is temporary, part-time and hourly, type a "W" in the Work Period field. Do not use "W" for Regular employees.' A yellow tip box at the bottom states: 'TIP: Regular/Full-Time job, FTE is 1.0; Temp/Hourly job, FTE is 0.'

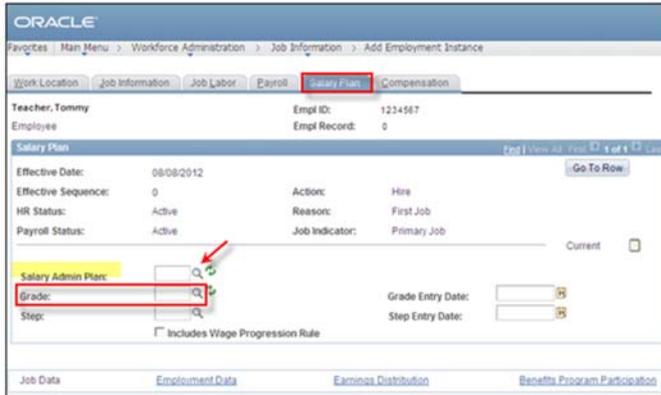
23. Click the **Job Labor** tab.
24. In the **Union Code** field, **DELETE** the data and press **TAB**.

The screenshot shows the Oracle Workforce Administration interface for adding an employment instance. The 'Job Labor' tab is selected. The employee is identified as 'Teacher, Tommy' with an 'Empl ID' of 1234567 and 'Empl Record' of 0. The 'Labor Information' section includes fields for Effective Date (08/08/2012), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Hire), Reason (First Job), and Job Indicator (Primary Job). A red box highlights the 'Union Code' field, which currently contains '01T' and 'PBC Classroom Teachers Assoc.'. Below this is a table for 'Assigned Seniority Dates' with columns for Seniority Date, Control Value, Labor Seniority Date, Override, and Override Reason.

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**.

The screenshot shows the Oracle Workforce Administration interface for adding an employment instance, now on the 'Payroll' tab. The 'Payroll Information' section includes fields for Effective Date (08/08/2012), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Hire), Reason (First Job), and Job Indicator (Primary Job). The 'Payroll System' is set to 'Payroll for North America' and the 'Absence System' is 'Other'. A red box highlights the 'Employee Type' field, which is set to 'H' (Hourly). A blue box contains a note: 'Note: The Pay Group field defaults to "NON" and the Holiday Schedule field defaults to "PBC."'. The 'Pay Group' is 'NON' and the 'Holiday Schedule' is 'PBC'. The 'Tax Location Code' is 'SDPBC' and the 'FICA Status' is 'Subject'. There are buttons for 'Retirement Plan' and 'Edit Char Fields'.

28. Click the **Salary Plan** tab.



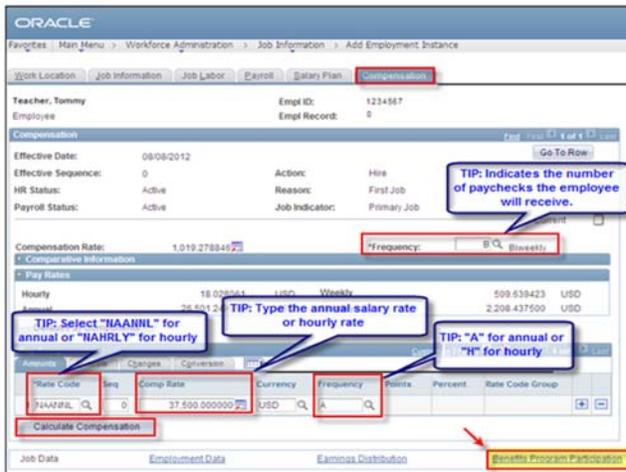
29. In the **Salary Administration Plan** field, click on the **magnifying glass** button.

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



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

IMPORTANT!!!

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

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..

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**.

NOTE: If you are creating a job for the employee at more than one school, there MUST BE a Benefit Record FOR EACH JOB.

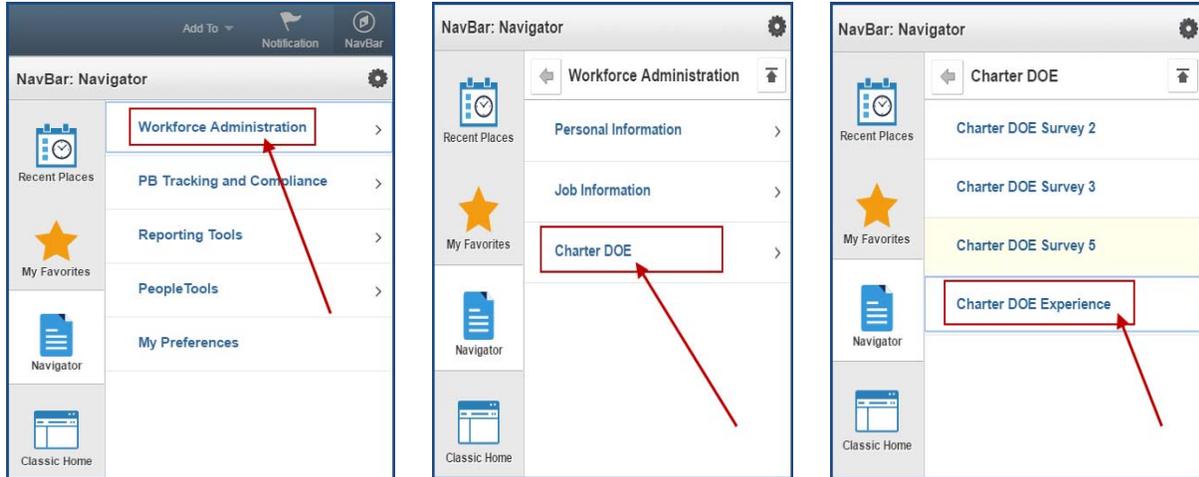
41. Click the **Apply** button. (NOT the **OK** button).

The screenshot shows the 'Benefit Program Participation' window for 'Teacher, Tommy' (Empl ID: 1234567, Empl Record: 2). The 'Benefit Status' section has 'Benefit Record Number' set to 1 and 'Effective Date' to 08/11/2015. A yellow callout box says 'NEW PROCESS: Change the Benefit Record Number to "1" and press TAB.' The 'Benefits Administration Eligibility' section has several empty fields. The 'Benefit Program Participation' section at the bottom has 'Effective Date' set to 08/11/2015 and 'Benefit Program' set to 'NOB'. A yellow callout box says 'NOTE: The effective dates in the Benefit Status and Benefit Program Participation Sections MUST BE THE SAME DATE.' Another callout box says 'Click the "Look up" button and choose "NOB" then press TAB.' At the bottom, a callout box says 'Click the "APPLY" button. (NOT the OK button).' The 'Apply' button is highlighted with a mouse cursor.

TIP: You will get several error messages. Click the OK button for all.

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.

The screenshot shows the 'Charter DOE Experience' search page. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search bar with the text 'Find an Existing Value'. Underneath is a section titled 'Search Criteria' with a dropdown arrow. It contains three input fields: 'Empl ID: begins with', 'Last Name: begins with', and 'First Name: begins with'. Each field has a dropdown arrow and a text input box. Two red arrows point to the 'Last Name' and 'First Name' input boxes. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and two links: 'Basic Search' and 'Save Search Criteria'.

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 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**.