



CHARTER SCHOOL DOE SURVEY STAFF REPORTING TRAINING MANUAL— SURVEY 3

Palm Beach County School District—HRIM Team

DOE - Survey 3

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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TABLE OF CONTENTS

DOE Staff Survey 3 Pages

PB Charter DOE Employee Search page	3
PB Charter DOE Staff Data page	4 - 5
PB Charter DOE Staff Data page - Evaluation Code	6
PB Charter DOE Staff Data page - Contract Status	6
PB Charter DOE Staff Data page - Supplements	7
PB Charter DOE Benefits page	8 - 9
PB Charter DOE Experience page	10 - 11

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 jobs in PeopleSoft for staff no longer working at your school.
 - B. Create jobs in PeopleSoft for 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**:
 - Mid-Year Evaluation Codes should be entered for all newly hired teachers.
(Note: New Schools must enter this for all teachers).
 - 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. Must have at least Social Security and Medicare for each employee.) ***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/Assistant Principals/Principals who did not have the information entered previously.)

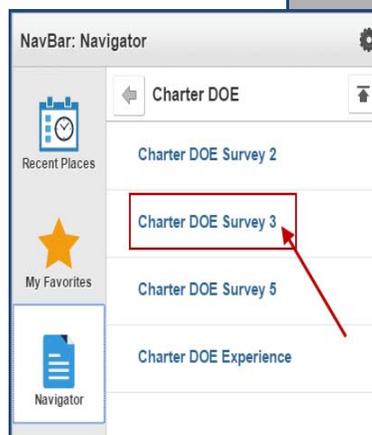
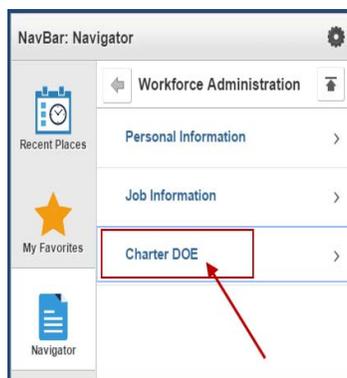
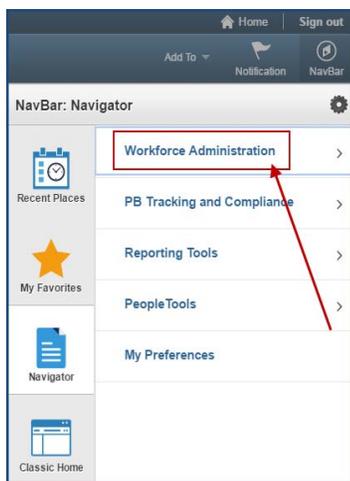
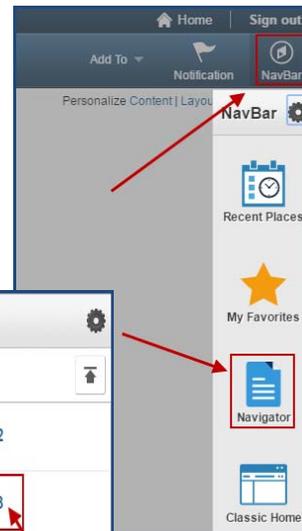
DOE Survey Staff Reporting

Survey 3 (February)

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 3**



The **Charter DOE Survey 3** 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 3

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID:	begins with ▼	<input style="width: 95%;" type="text"/>	←
Empl Record:	= ▼	<input style="width: 95%;" type="text"/>	←
DOE Survey Period:	begins with ▼	3 <input style="width: 95%;" type="text"/>	
Last Name:	begins with ▼	<input style="width: 95%;" type="text"/>	←
First Name:	begins with ▼	<input style="width: 95%;" type="text"/>	

Case Sensitive

Search

Clear

[Basic Search](#) [Save Search Criteria](#)

Charter DOE Survey 3 pages

The Charter DOE Survey 3 pages will display with two tabs:

- **PB Cht DOE Survey3**
- **PB Cht DOE Ben Sv3**

Please note: The **Charter DOE Experience page** is a “stand-alone” page accessed via the **Charter DOE** menu. Once information has been entered into the **Charter DOE Survey 3** pages, navigation to the **Charter DOE Experience page** is needed to access the input page. 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. On the first tab/page (**PB Cht DOE Survey3**), the current Fiscal Year will display for new employees. Information will be entered on this page for new employees. For employees who have a prior fiscal year survey row, click on the “+” sign to add a new row displaying the new Fiscal Year. *Note: For employees with more than one job at your school, you will need to enter the information for each job.*

PB Cht DOE Survey3 PB Cht DOE Ben Sv3

Name: Teacher, Tommy Empl ID: 1234567

Empl Record 2 Job Data

Survey 3 - Charter School DOE Staff Data Find | View All First 2 of 4 Last

Click the + sign to add a new record -->

Empl ID 1234567 Teacher, Tommy

Srvy Per 3 Fiscal Year FY1617

Schl Num 1234 Dept Name Anytown Charter School

*Job Code 12345 Job Title Teacher - High School

Mid Year Teacher Evaluation - First Year Teachers

All First year Teachers must have an Evaluation Code for Survey 3.

Evaluation Code Per FL State Statute 1012.34

Contract Status for Instructional Staff & School Admins

Enter Contract Status for Survey 3 Per FL State Statute 1012.33

Contract Status FL DOE Contract Definitions

Salary Supplements Find First 1 of 1 Last

For Survey 3 report Supplements by annual amount and type. FL DOE Supplement Definitions

Supp Type Supp Amount

Last updated by Last Update Date/Time

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

- **Evaluation Code (Newly hired teachers must have a Mid Year evaluation code)**
- **Contract Status (Teachers, Principals, and Assistant Principals)**
- **Salary Supplements**

Each section has a dropdown menu to choose from. The Supplement section also includes a field to enter the projected Annual supplement amount. (Do not input a per paycheck amount unless it is the full annual amount.)

PB Cht DOE Survey3 PB Cht DOE Ben Sv3

Name: Teacher, Tommy Empl ID: 1234567

Empl Record 2 Job Data

Survey 3 - Charter School DOE Staff Data Find | View All First 2 of 4 Last

Click the + sign to add a new record - - -> + -

Empl ID 1234567 Teacher, Tommy

Srvy Per 3 Fiscal Year FY1617

Schl Num 1234 Dept Name Anytown Charter School

*Job Code 12345 Job Title Teacher - High School

Mid Year Teacher Evaluation - First Year Teachers

All First year Teachers must have an Evaluation Code for Survey 3.

Evaluation Code Per FL State Statute 1012.34

Contract Status for Instructional Staff & School Admins

Enter Contract Status for Survey 3 Per FL State Statute 1012.33

Contract Status FL DOE Contract Definitions

Salary Supplements Find First 1 of 1 Last

For Survey 3 report Supplements by annual amount and type. FL DOE Supplement Definitions

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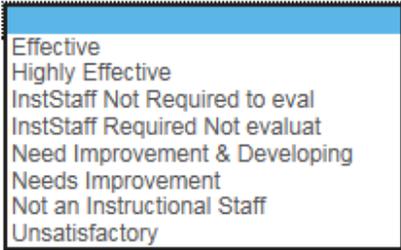
Last updated by Last Update Date/Time

Evaluation Code section:

- 2. Click the **drop down arrow** to select the **Evaluation Code** for the newly hired teachers for your school for this school year. (New schools must enter the information for all teachers.)

Mid Year Teacher Evaluation - First Year Teachers

All First year Teachers must have an Evaluation Code for Survey 3.

Evaluation Code  Per FL State Statute 1012.34

Effective
Highly Effective
InstStaff Not Required to eval
InstStaff Required Not evaluat
Need Improvement & Developing
Needs Improvement
Not an Instructional Staff
Unsatisfactory



Contract Status section:

- 3. Click the **drop down arrow** to select the **Instructional** or **School Administrative** (Teachers, Principals, Assistant Principals) 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.

Contract Status for Instructional Staff & School Admins

Enter Contract Status for Survey 3

Contract Status  Per FL State Statute 1012.33
FL DOE Contract Definitions

Annual Contract
Continuing Contract
Multiyear Contract
Not Applicable
Probationary Contract
Professional Services Contract
Single Status Contract



Salary Supplements section:

4. Enter all employee supplement types and amounts paid to the employee. The Projected Annual monetary amount for each supplement should be entered. Do not enter a per paycheck amount unless it is the full Annual amount. (If no Supplements were paid, leave this section blank.)

Click the “+” to add additional supplements. If a **Supplement Type** is not listed, use **Other Supplements**. The **Other Supplements** choice can only be used one time. If there is more than one **Supplement Type** that is not listed, the supplement amounts must be combined before choosing **Other Supplements**.

Salary Supplements

Find First 1 of 1 Last

For Survey 3 report Supplements by annual amount and type.

FL DOE Supplement Definitions

Supp Type

Last update

Supp Amount

Last Update Date/Time

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 Baccalaurate 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

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

Save Return to Search

Charter DOE Benefits page

1. Click on the **PB Cht DOE Ben Sv3** tab.
2. Enter the EMPLOYER-PAID benefits information (per pay period) for the employee in the Charter Benefits Section. For each Benefit, you must enter the following items listed below. (Sample images are below and on the next page).
 - **Benefit Type**
 - **Benefit Amount**
 - **Benefit Frequency**(Please note: You must have at least **Social Security** and **Medicare** for each paid employee.)
3. Click the “+” to enter additional benefits.
4. Once all information has been entered, click **SAVE**.
Navigate back to the **Charter DOE Survey 3** Search page to enter a new employee. Do not use the *Return to Search* button.

The screenshot displays the 'PB Cht DOE Ben Sv3' tab in a web application. At the top, there are two tabs: 'PB Cht DOE Survey3' and 'PB Cht DOE Ben Sv3', with the latter being active and highlighted by a red box. Below the tabs, the employee's name is 'Teacher, Tommy' and the 'Empl ID' is '1234567'. There is also a 'Job Data' button. The main content area is titled 'Survey 3 - Charter School DOE Benefits' and contains a table with the following information:

Empl ID	1234567	Srvy Per	3	Fiscal Year	FY1718
Schl Num	1234	Dept Name	Anytown Charter School		
Job Code	12345	Job Title	Teacher - High School		

Below the table is a section titled 'Charter Benefits' with a '+ -' button. A red arrow points to the '+' button. Below this is a text instruction: 'For Survey 3: Report employer paid benefits per pay period by type by job with frequency per benefit.' A red box highlights the 'Benefit Type', 'Benefit Amount', and 'Benefit Frequency' input fields. To the right of these fields is a link for 'FL DOE Benefit Definitions'. At the bottom of the page, there are two buttons: 'Save' (highlighted with a red box) and 'Return to Search'.

- **Benefit Type choices**

Charter Benefits Find First 1 of 1 Last

For Survey 3: Report employer paid benefits per pay period by type by job with frequency per benefit.

Benefit Type (dropdown menu): Cafe Plan, Cafe-Admin, FRS, Health, Ins Annuit, Life Ins, Medicare, Other, Social Sec, Unemp Comp, Wkrs Comp

FL DOE Benefit Definitions

Benefit Amount

Benefit Frequency

- **Benefit Amount field** (Enter the Employer-paid per paycheck amount.)
- **Benefits Frequency choices** (You must choose a frequency.)

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

Empl ID 1234567 Srvy Per 3 Fiscal Year FY1718

Schl Num 1234 Dept Name Anytown Charter School

Job Code 12345 Job Title Teacher - High School

Charter Benefits Find First 1 of 1 Last

For Survey 3: Report employer paid benefits per pay period by type by job with frequency per benefit.

Benefit Type (dropdown menu) ← FL DOE Benefit Definitions

Benefit Amount (text field) ←

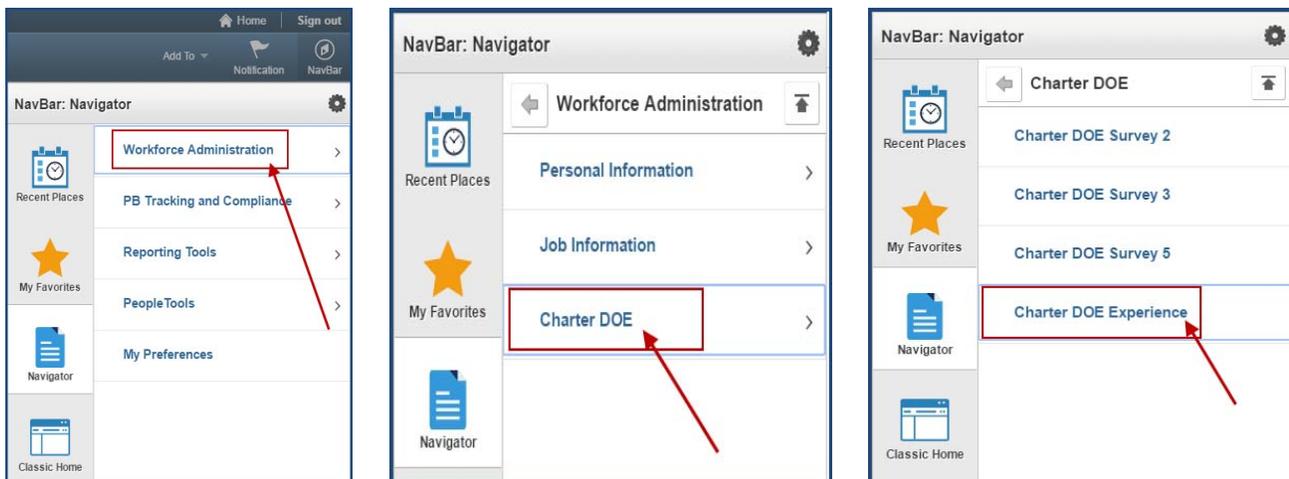
Benefit Frequency (dropdown menu): Bi-month22, Bi-weekly, Bimonth24, Monthly ←

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.

The screenshot shows the 'Charter DOE Experience' search page. It includes a search criteria section with three input fields: 'Empl ID', 'Last Name', and 'First Name'. Each field has a dropdown menu set to 'begins with' and a text input area. Red arrows point to the dropdown menus and the 'Search' button. The 'Search' button is highlighted with a red box. Below the search criteria, there are buttons for 'Search', 'Clear', '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

Once the **PB Cht DOE Exp** page appears, you will need to enter the experience information for any **new** Teachers, Principals, or Assistant Principals. (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. (See requirements, below.)
Enter completed years in double digits. (5 years complete = 05; 12 years complete = 12)
2. Click on the “+” to add each additional experience type.
3. Click **SAVE**.

*NOTE: For teachers 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.”*

DOE Experience Requirements:

For **Teachers**, 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) *Should be equal to or greater than* Years Teaching in the District.

For **Principals** and **Assistant Principals**, the following information **MUST** be entered:

- Years in Administration in Education

The screenshot shows the 'PB Cht DOE Exp' form for 'Teacher, Tommy' (Empl ID 1234567). The form includes instructions for entering experience years and a list of experience types. Red boxes and arrows highlight the following elements:

- Instructions:** 'Only enter for Instructional and Administrative personnel.' and 'Enter number of years of experience for each Experience type. Example: New Teacher in 1st year = 00; Completed 1 yr = 01; Completed 5 yrs = 05; Completed 12 yrs = 12. If Exp Type is not applicable for employee, do not enter it.'
- Teacher Requirements:** A red box highlights the requirements for teachers: 'All Teachers must have at least the following: Years Teaching in current job code in District, Years Teaching in the District, Years Teaching in Florida Public Schools.'
- Principal/AP Requirements:** A red box highlights the requirement for principals/assistant principals: 'All Principals/AP's must have at least the following: Years in Administration in Education.'
- Form Fields:** A red box highlights the 'Exp Years' input field, and another red box highlights the '+' button to add a new experience type.
- Experience Types:** A dropdown menu is open, showing options 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 red arrow points to this dropdown.
- Save Button:** A red box highlights the 'Save' button at the bottom left.