



CHARTER SCHOOL DOE SURVEY STAFF REPORTING TRAINING MANUAL— SURVEY 2

Palm Beach County School District—HRIM Team

DOE - Survey 2

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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TABLE OF CONTENTS

DOE Staff Survey 2 Pages

<u>PB Charter DOE Employee Search page</u>	3
<u>PB Charter DOE Staff Data page</u>	4
<u>PB Charter DOE Staff Data page - Contract Status</u>	5
<u>PB Charter DOE Staff Data page - Supplements</u>	5
<u>PB Charter DOE Benefits page</u>	6
<u>PB Charter DOE Experience page</u>	7 - 8

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 staff no longer working at your school.
 - B. Enter 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** (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.)

***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/APs/Principals who did not have the information entered with the Job Creation process.)

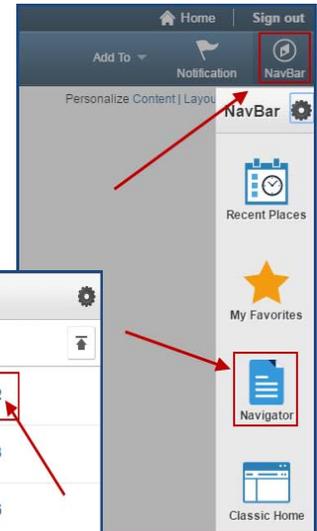
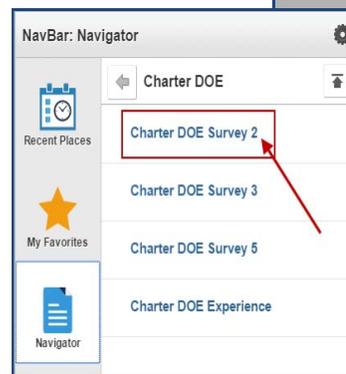
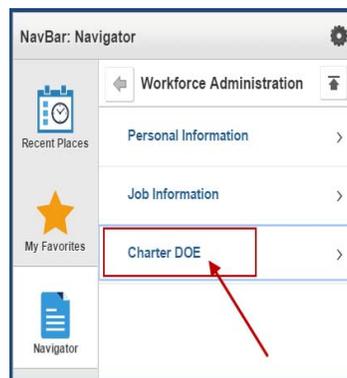
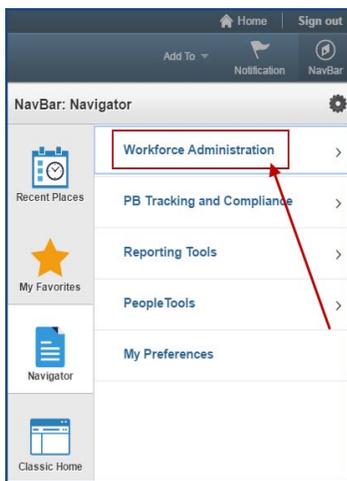
DOE Survey Staff Reporting

Survey 2 (October)

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 2**



The **Charter DOE Survey 2** 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 2

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 type="text"/>	←
Empl Record	= ▼	<input type="text"/>	
DOE Survey Period	begins with ▼	2	
Last Name	begins with ▼	<input type="text"/>	←
First Name	begins with ▼	<input type="text"/>	

Case Sensitive

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

Charter DOE Survey 2 pages

The Charter DOE Survey 2 pages will display with two tabs:

- **PB Cht DOE Survey2**
- **PB Cht DOE Ben Sv2**

(Please note: The Teaching Experience page is a “stand-alone” page in the Charter Survey 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:

1. While on the first tab (PB Cht DOESurvey2), click on the “+” sign to add a new row for the new Fiscal Year for existing employees. (New employees should already have the new Fiscal Year displayed).

The screenshot displays the 'PB Cht DOE Survey2' tab. At the top, it shows the user's name 'Teacher, Tommy' and 'Empl ID: 1234567'. Below this is a 'Job Data' button and 'Empl Record 0'. The main section is titled 'Survey 2 - Charter School DOE Staff Data' and includes a table with the following information:

Empl ID	1234567	Teacher, Tommy	
Srvy Per	2	Fiscal Year	FY1718
Schl Num	1234	Dept Name	Anytown Charter High School
*Job Code	51900	Job Title	Tch Sec English 9-12

A yellow callout bubble points to the 'FY1718' field with the text: 'If the previous Fiscal Year is displayed, click the plus (+) sign to add a row.' A red arrow points to the '+' sign in the table's navigation controls. Below the table is a section for 'Contract Status for Instructional Staff & School Admins' with a dropdown menu for 'Contract Status' and a link to 'FL DOE Contract Definitions'. At the bottom, there is a 'Charter Supplements' section with a dropdown for 'Supp Type' and a text input for 'Supp Amount'.

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

- **Contract Status**
- **Charter Supplements**

Each section has a dropdown menu to choose from. The **Contract Section** is only for Instructional Employee and School Administrator information. The **Supplement Section** includes a field to input the Annual supplement amount. (DO NOT enter per paycheck amount unless it is the full amount for the year.)

Contract Status section:

2. Click the **dropdown arrow** to select the *Instructional* or *School Administrative* 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 2

Per FL State Statute 1012.33

Contract Status

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

FL DOE Contract Definitions

Charter Supplements section:

3. Enter all employee supplement types and the projected **Annual** amount(s). Do not enter a per paycheck amount unless it is the total amount for the year for that supplement. Click the “+” to add additional supplements.

Charter Supplements

For Survey 2 re

FL DOE Supplement Definitions

Supp Type

- Academic Supplement
- Additional Academic Responsib
- Advanced Degree-area of certif
- Advanced Internat'l Cert Educ
- Advanced Placement Instr Bonu
- 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

Supp Amount

Last Update Date/Time

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

Charter DOE Benefits page

1. Click on the **PB Cht DOE Ben Sv2** tab.
2. Enter the EMPLOYER-PAID benefits for the employee in the Charter Benefits Section:
 - 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**.

The screenshot shows the 'PB Cht DOE Ben Sv2' tab selected. The user is logged in as 'Teacher, Tommy' with 'Empl ID: 1234567'. The 'Empl Record' is 0. The 'Job Data' section shows 'Empl ID 1234567', 'Srvy Per 2', 'Fiscal Year FY1819', 'Schl Num 1234', 'Dept Name Anytown Charter High School', 'Job Code 51900', and 'Job Title Tch Sec English 9-12'. The 'Charter Benefits' section has a '+ -' button. Below it, a red box highlights the 'Benefit Type', 'Benefit Amount', and 'Benefit Frequency' fields. Red arrows point to these fields from the text 'FL DOE Benefit Definitions'. At the bottom, a red box highlights the 'Save' button.

This screenshot shows the 'Charter Benefits' section with a dropdown menu open for 'Benefit Type'. The dropdown list includes: Cafe Plan, Cafe-Admin, FRS, Health, Ins Annuit, Life Ins, Medicare (highlighted with a red box), Other, Social Sec (highlighted with a red box), Unemp Comp, and Wkrs Comp. Red arrows point to the dropdown and the text 'FL DOE Benefit Definitions'.

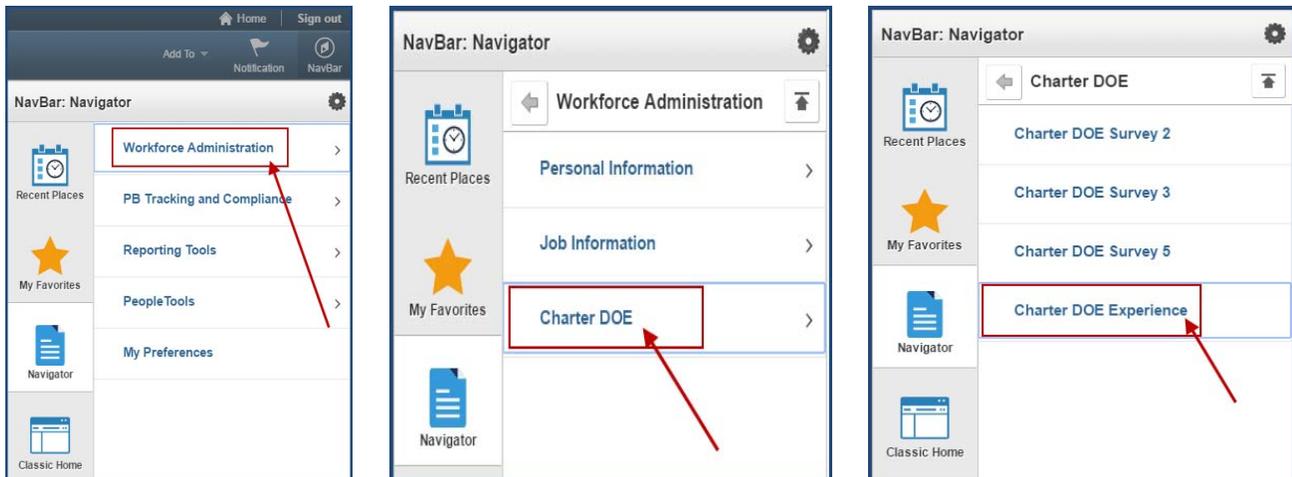
This screenshot shows the 'Charter Benefits' section with dropdown menus open for 'Benefit Amount' and 'Benefit Frequency'. The 'Benefit Amount' field is highlighted with a red box. The 'Benefit Frequency' dropdown list includes: Bi-month22, Bi-weekly, Bimonth24, and Monthly. Red arrows point to the 'Benefit Amount' field and the 'Benefit Frequency' dropdown.

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 begins with', 'Last Name begins with', and 'First Name begins with'. Each field has a red arrow pointing to it. Below the input fields is a 'Search' button, also highlighted with a red box and a red arrow. Other buttons include '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 Instructional or School Administrative employees for the current fiscal year who have not had the information previously entered. (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 for each new employee.
2. Click on the “+” to add each additional experience type. (Three types required for teachers.)
3. Click **SAVE**.

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.)

Note: Years Teaching in Florida Public Schools must be EQUAL TO or GREATER THAN Years Teaching in the District.

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

- Years in Administration in Education

The screenshot shows the 'PB Cht DOE Exp' page for 'Teacher, Tommy' with 'Empl ID 1234567'. It includes instructions for entering experience information, requirements for teachers and principals, and a table for adding experience types. Annotations include callouts for 'How to Enter' the experience information, 'Teacher Requirements', and 'Administrator Requirements'. A 'Save' button is highlighted, and a '+' button is shown next to the 'Exp Years' input field.

PB Cht DOE Exp

Teacher, Tommy Empl ID 1234567

Only enter for Instructional and Administrative personnel.

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.

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.

All Principals/AP's must have at least the following:

- Years in Administration in Education.

DOE Teaching & Prin/AP Experience - Years of Experience Find First 1 of 1 Last

Exp Type	Exp Years
Adm/Prin/AP in Education	<input type="text"/>
Current Job code in District	<input type="text"/>
Military Service	<input type="text"/>
Teaching Fla Private schools	<input type="text"/>
Teaching Out of State Private	<input type="text"/>
Teaching Out of State Public	<input type="text"/>
Teaching in District	<input type="text"/>
Teaching in Fla Public Schools	<input type="text"/>