Sonoma County Office of Education

Employee Management Tabs



July 2023

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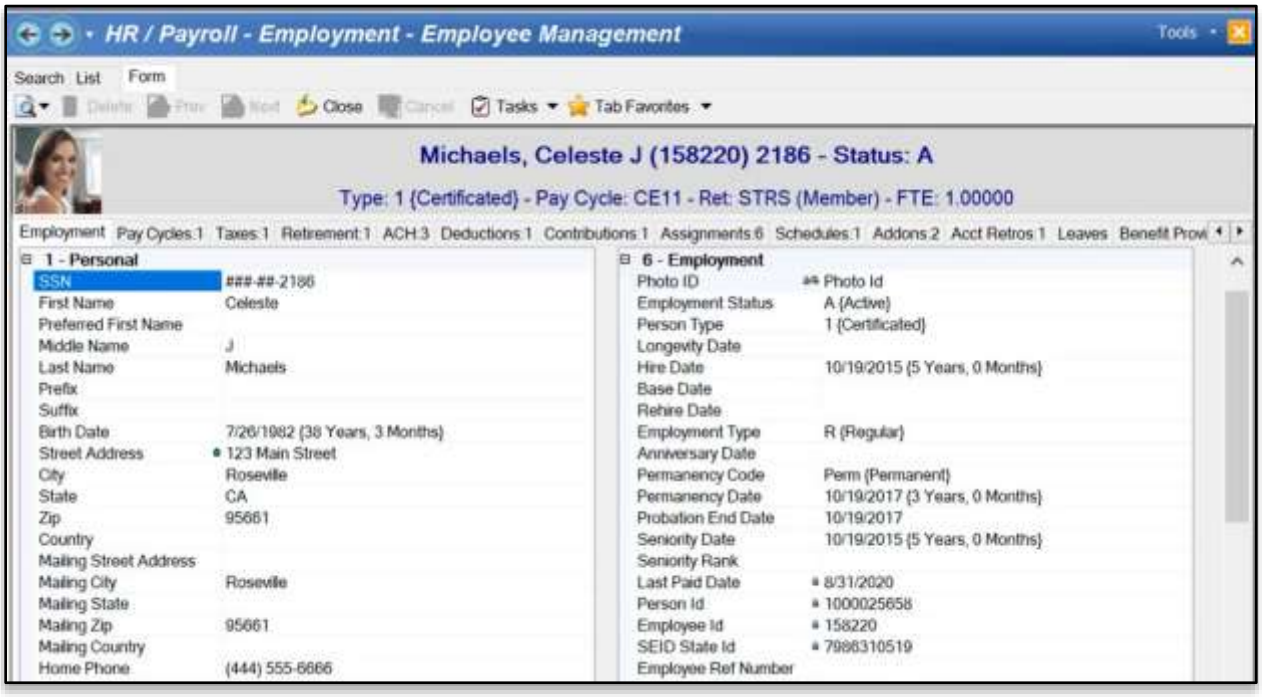
Employee Record Tabs

The Employee record is the most complex record in the Frontline ERP system. It has over two dozen tabs (27 to be exact!). Some of the tabs are “smart” tabs, meaning that they only show when there is information to display.

HR > Payroll > Employment > Employee Management

EMPLOYMENT

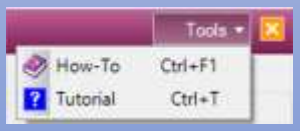
The Employment tab contains the basic information for the employee record.



SECTION 1: Personal

- **SSN / Re-enter SSN** (if new employee) If existing employee SSN is masked
- **First Name, Preferred First Name, Middle Name, Last Name, Prefix, and Suffix** –
- **Street Address, City, State, Zip, Country**
- **Mailing Street Address, City, State, Zip, County** –If this is the same as the home address, do not enter a mailing address. *The system automatically defaults to the home address if the mailing address is blank.*
- **Home Phone**
- **Home Cell Phone**
- **Birth Date**
- **Gender**

Tools are available in every screen for system Documentation and Tutorials



Employee Record Tabs 47:03

Playlist of tabs in the Employee record, highlighting special logic for fields and tabs.

Jump to Employment Tab

SECTION 2: Employee Contact Information

- **Personal Email**
- **Work Email**
- **Payroll Email Address** – Use the lookup to select the email address for the emailing of ACHs from Payroll Processing.
- **PIN Option** – Use the lookup to define a PIN option for this employee.
- **Work Phone, Extension, Cell**
- **Employee Directory Code** – Use the lookup window to select the code. This field is used for searching and exporting.
- **Opt Out Union Personal Info** - Set to YES to designate the employee as having opted out of the Union Employee Information report to bargaining units, as specified in AB119. Employees who opt-out of the report will not have their personal information (i.e., Home Phone Number, Cell Phone Number, Personal Email Address, Mailing Address, and Home Address) included in the report.

- **Info Release Code** – Use the lookup window to select the code for what information about the employee may be released to others. Districts use this for internal lists and reports. There is no logic associated with this flag.
- **Mail Stop** – Use the lookup window to select the location of mail delivery for the employee, if different from their work location. Note that this code is separate from the location defined in the pay cycle, assignment, and/or addon. It may or may not match the other locations.

SECTION 3: Employee Portal

If your district uses the Employee Portal, this section will detail when the EE last logged in, etc. The fields are mostly *Read Only* and are populated after the employee's initial portal log in. **The only editable field is Portal Access Enabled as detailed below**:

- **Portal Access Enabled** – The portal registration process automatically sets this flag to YES upon successful registration. The only time you would change this flag to NO is to turn off portal access for the employee for this single organization. This flag does not affect the sending of payroll emails.
- **Portal Access ID** – Read-only. This is the username/email used by the user to login into the Employee Online portal. This field may be different from the Email Address, based on Portal and Navigation parameters.
- **Portal Login Disabled** – Read-only, but can be changed to NO using the Enable Portal Login task if you have the user-based permissions and this flag is set to YES, which means the user has been locked out. Setting to NO will unlock their login. If you change the flag to NO, a history record will be written to the Portal User record. The most common reason for an employee to have their access disabled is entering too many incorrect passwords.
- **Portal Email Address – Read-only**. The user's email address defined at the time of registration.
- **Portal Password Changed** – Read-only. Date/time the user last changed their password.
- **Portal Last Authenticated** – Read-only. Date/time the login process last performed a two-factor authentication (2FA).

SECTION 4: Emergency/Spouse

- **Emergency Contact Name**
- **Contact Phone/Ext**
- **Contact Relationship**
- **Emergency Doctor**
- **Doctor Phone/Ext**
- **Spouse Name**
- **Spouse Birth Date**
- **Spouse Phone/Ext**



SECTION 5: Experience

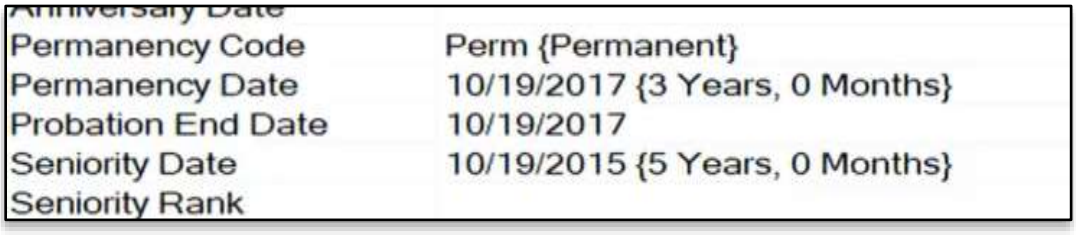
The system calculates experience using a hierarchy to determine the "base" date. It is calculated in one of two ways, as defined in the Organization record. Experience years are based on Base Date, Seniority Date, or Hire Date, in that order. Experience years are based on Base Date or Seniority Date.

- **Experience Yrs** – This is computed from the base date to the termination date or TODAY.
- **Experience Yrs Adj** – Enter the number of years (negative or positive) to adjust the total number of years of experience.
- **Experience Yrs in State** – Enter the years of other experience for the employee in the state. You can edit this field with a positive or negative number, allowing you to adjust the experience total.
- **Experience Yrs Out of State** – Enter the years of other experience for the employee out of the state. You can edit this field with a positive or negative number, allowing you to adjust the experience total.
- **Experience Years Prior** – Enter the number of years of prior experience for the employee. You can edit this field with a positive or negative number, allowing you to adjust the experience total.
- **Experience Yrs Total** – This is a calculated field. It is the total of the five previous fields.

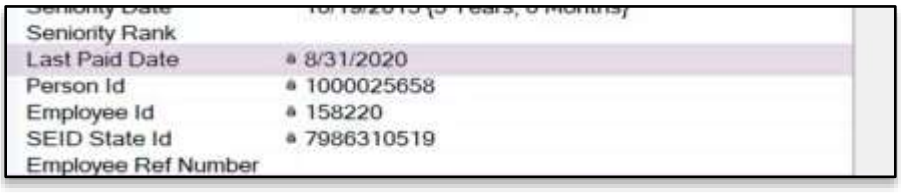
SECTION 6: Employment

- **Employment Status** –Examples include inactive, leave of absence, reemployment, volunteer. (Required)
- **Person Type** –The most common are certificated and classified. (Required)
- **Longevity Date** – Enter a date for longevity. This date is used in determining longevity for extra pay for addons and assignments. The system uses the following logic to determine longevity.
    - Use the longevity date in the addon and assignment to determine longevity. (If the longevity addon is in the assignment salary schedule, the assignment longevity date will be used.)
    - If those are blank, use the longevity date in the employee record.
    - If that is blank, use the Base Date in the employee record.
    - If that is blank, use the Hire Date in the employee record.
- **Hire Date** – Enter the original hire date for the employee — often used in leave, seniority, and other calculations. Depending on your setup, it may be used in calculating experience.
- **Rehire Date** – Enter the date the employee was rehired. This date cannot be earlier than the hire date. This date is NOT USED in any leave, experience, or seniority calculations. It is for reporting rehired employees to the Employment Development Department, determining the hire date for ACA reporting, and as a parameter in several reports.
- **Base Date** – Enter a date to override the hire date for leave, experience, and other calculations. You could use it, for example, to record the date a substitute became an employee. The system uses the following logic to calculate leaves.
    - If a leave base date (on the Leaves tab) is present, it is used.
    - If no leave base date, then the base date (on the Employment tab) is used.
    - If no leave base date or base date, then the hire date is used.
- **Employment Type** – Use the lookup window to select a code to indicate whether the employee is with the district temporarily.
- **Anniversary Date** – Enter the anniversary for the employee, which may be different from the original hire date. You can also set the anniversary date for a future year so that the movement on the step/column is delayed until that time. For example, some districts do not allow movement on the salary schedule for the first fiscal year of employment. The employee has to wait until the following year.
    - The roll-forward process uses this date for all of the employee's assignments unless an assignment has a different anniversary date specified.
    - Budget projections use this date. If the employee's bargaining unit is set to increment on July 1, you should leave this date blank.

- **Permanency Code** – Use the lookup window to select the permanency status (e.g., permanent, probation, etc.) for the employee. (This field is based on district standards)
- **Permanency Date** – Enter the date for the permanency code specified.



- **Probation Date** – Enter the date when the probationary status for the employee ends.
- **Seniority Date** – Enter the date of seniority for calculating experience and seniority. This date (or base or hire date if blank) will be used on the Employee59 report.
- **Seniority Rank** – Enter a rank to be used for the date above. Some districts use this for manually tracking the seniority of employees hired on the same date. This ranking is designed to help you differentiate between employees (regardless of assignment) hired on the same date. If you want to have rankings that are tied to job class and/or FTE, you would want to use the Seniority Ranking field on the Seniority tab. The rank entered into this field is displayed on the Employee59 report.
- **Last Paid Date** – Displays the date the employee last received pay (greater than zero dollars).



- **Person ID** – This retirement identifier field is generated automatically.
- **Employee ID** – This employment identifier field is generated automatically.
- **SEID State ID** – This Statewide Educator identifier is read-only from the Credential Holder record.
- **Employee Reference Number** – Enter Employment Number for other systems (e.g., retirement system).
- **Active Setup Records** – Lists the active records (as of TODAY) in the tabs in alphabetical order. For example, if the field displays "ACH, Addons, Assignments, Benefit Providers, Contributions, Creds, Dependents, Pay Cycles, Retirement, Taxes" that would mean that all of those tabs contain active setup records. Note that this field does not consider the Leave, Authorizations, Flex, Education, Attachments, History, Seniority, Schedule, and Notes tabs because they are not date-based setup records.

SECTION 7: Ethnicity and Race

If your organization has implemented an interface to Aeries, the Race 1 and Ethnicity fields are required.

- **Ethnicity** – Use the lookup window to select between Hispanic and Non-Hispanic. *As of 7/1/09, government regulations require an entry in this field for all new employees.*
- **Race 1-5** – Use the lookup window to select a race, up to five may be entered. *As of 7/1/09, government regulations require at least one race (or declined to state) to be identified for all new employees.*

SECTION 8: Employment Requirements

These fields are completed based on District Standards

- **Fingerprint Type** – Use the lookup window to select a fingerprint type (e.g., credentialed, adult education, TCC, volunteer). This field is required if you report "No Longer Interested" to the Department of Justice.
- **Fingerprint Date** – Enter the date the fingerprint was taken.
- **Fingerprint Comment** – Enter any comment associated with the fingerprint type or date.
- **DOJ Clearance** – Enter the date of the Department of Justice clearance.
- **FBI Clearance** – Enter the date of the Federal Bureau of Investigation clearance.
- **I9 Status** – Use the lookup window to select the I9 status for the employee.
- **I9 Date** – Enter the date the I9 was completed.
- **TB Test Type** – Use the lookup window to select the TB test type (e.g., x-ray- risk assessment as required by AB 1667, skin, etc.) last taken by the employee.
- **TB Expiration Date** – Enter the date the TB test expires.
- **Physical Test Code** – Use the lookup window to indicate the employee's physical status.
- **Physical Date** – Enter the date of the last physical.

SECTION 9: Termination

- **Termination Date** – Enter the date of the termination of the employee. An employee with a termination date will be affected when the roll forward procedure is run, depending on the fiscal year the termination date occurs. If the termination date is after the beginning of the next fiscal year, the roll forward procedure will create an assignment record for the employee for the next year that has an end date equal to the termination date. If you report "No Longer Interested" to the Department of Justice, this field will be included in the file.
- **Last Date Worked** – Enter the date the employee last worked.
- **Last Paycheck Date** – Enter the last pay date for this employee. The payroll software will produce an error if an attempt is made to pay an employee on a date later than what is in this field.
- **Rehire** – Enter YES or NO if the employee can/cannot be rehired. (Defaults to YES.)
- **Termination Code** – Use the lookup window to select the code for termination reason.
- **Previous Termination Date** – Enter the date of the previous termination of the employee.

SECTION 10: Benefits

- **Benefits Eligibility Date** – Enter the date the employee becomes eligible for benefits.
- **Benefits Change Date** – Enter a date of the last (or future) change to benefits.
- **COBRA Expiration Date** – Enter the date the employee's COBRA benefits expire.
- **ACA Bargaining Unit** – Use the lookup to select a bargaining unit. If the employee doesn't have an assignment, the system will use the MEC provider/level and cap from this bargaining unit for 1095-C reporting. (This will not override an assignment bargaining unit. If the employee has an assignment, the assignment's bargaining unit will be used for the months during the assignment from/thru dates.)

SECTION 94 – SB 792 Requirements

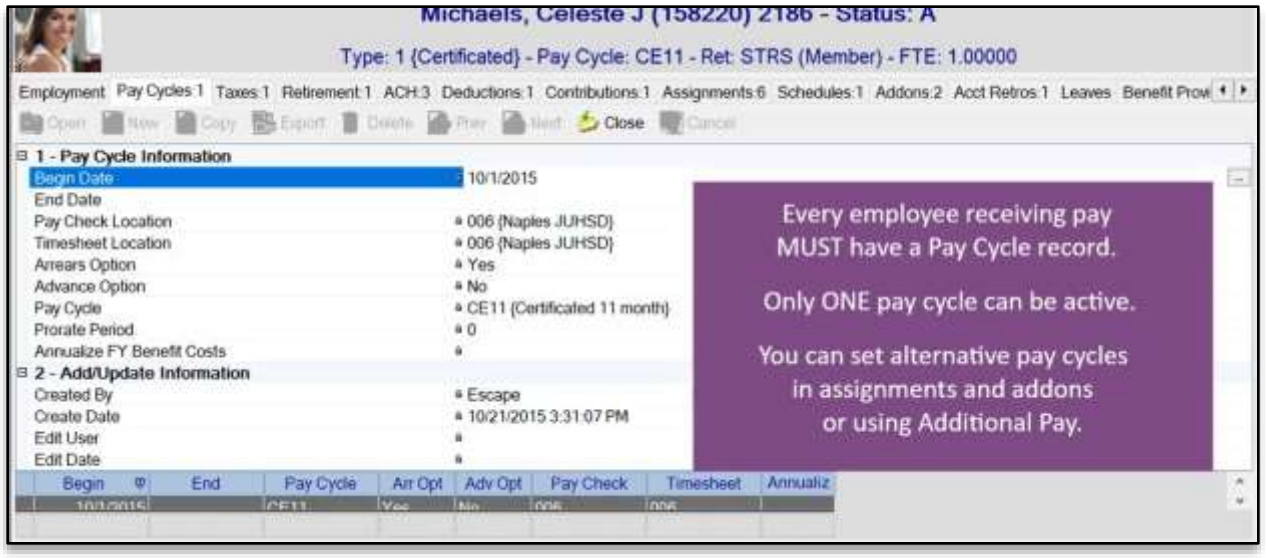
SECTION 95: Mandated Reporter Training

SECTION 99: Custom

This section will appear on your form if your implementation includes custom (extended record) fields.

PAY CYCLE

The Pay Cycle record defines when an employee will be paid and for what period. All positional pay, benefit processing and most voluntary deductions will occur on the employee's "primary" or assigned pay cycle.



You can assign as many employees to a single pay cycle as you need, and an employee may be paid on more than one pay cycle.

There must be a Pay Cycle record for each employee receiving pay. These records define:

- Employee's pay cycle

  Arrears Option is for DNP {Deferred Net Pay}

    - This option is available for 10 or 11 pay employees only in order to receive 12 payments
- Location of time reporting
- Location where employee receives paychecks

The employee pay cycle record defines the dates for paying the employee and where the employee's paycheck is delivered. The pay dates are controlled by the system Pay Schedule and Pay Cycle records. Both of these are defined in the Setup-Payroll group activity. The location is controlled by the Organization record.

This record is essential for the payroll computation, as well as budget calculations.

SPECIAL CONSIDERATIONS

An employee can only have one active pay cycle. We refer to this active pay cycle defined in the employee record as the employee's *primary* pay cycle.

If an addon does not have a pay cycle specified, the pay will be on the primary pay cycle. Otherwise, the addon will be paid on the pay cycle specified in the addon. When the specified pay cycle is not the primary pay cycle, we refer to it as a non-primary pay cycle. (Employees can also be placed on manual pay cycles and arrears pay cycles.)

Miscellaneous deductions are always taken on the primary pay cycle, unless you set the All Pay Cycles field in the deduction record to YES (e.g., for garnishments) or the deduction is associated with an assignment or addon that is on a non-primary pay cycle.

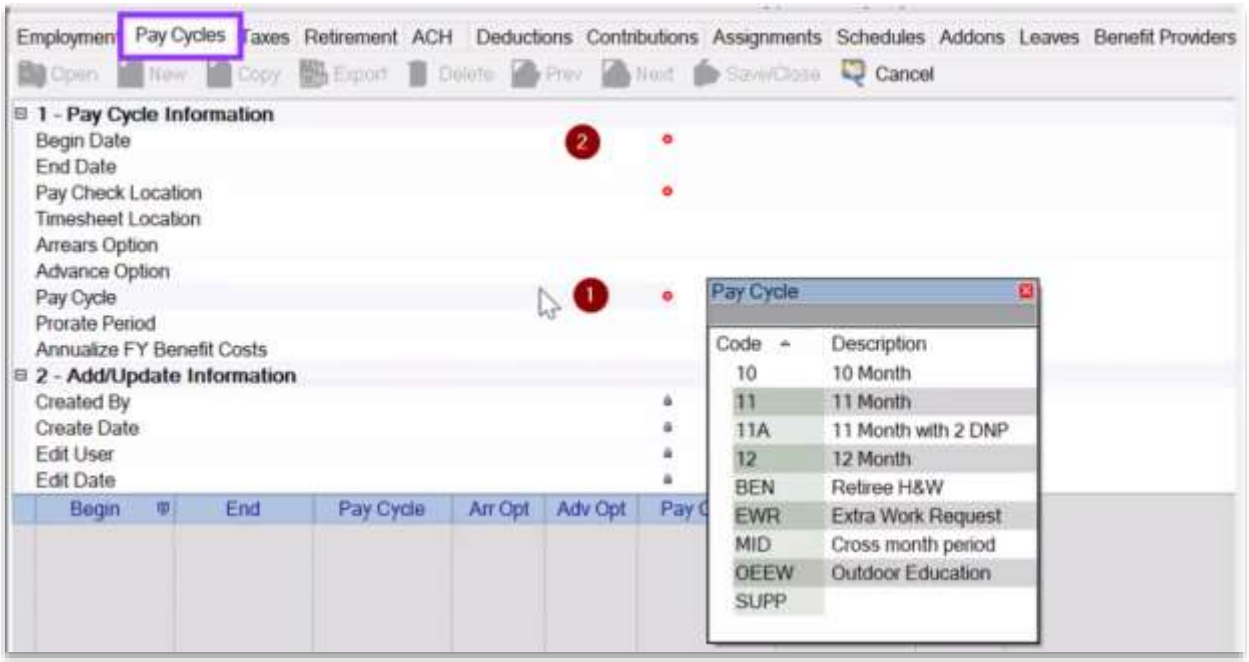
Extra FIT and SIT amounts are calculated on the ***primary pay cycle only***.

ACH records can be defined to apply to the primary pay cycle only.

Many calculations, including benefit refunds, use the primary pay cycle earning period to determine other information, such as bargaining unit and FTE.

PRO TIP:

When entering employee new pay cycle record, always select the pay cycle first – to allow the software to validate period dates and select the correct begin date for the record.



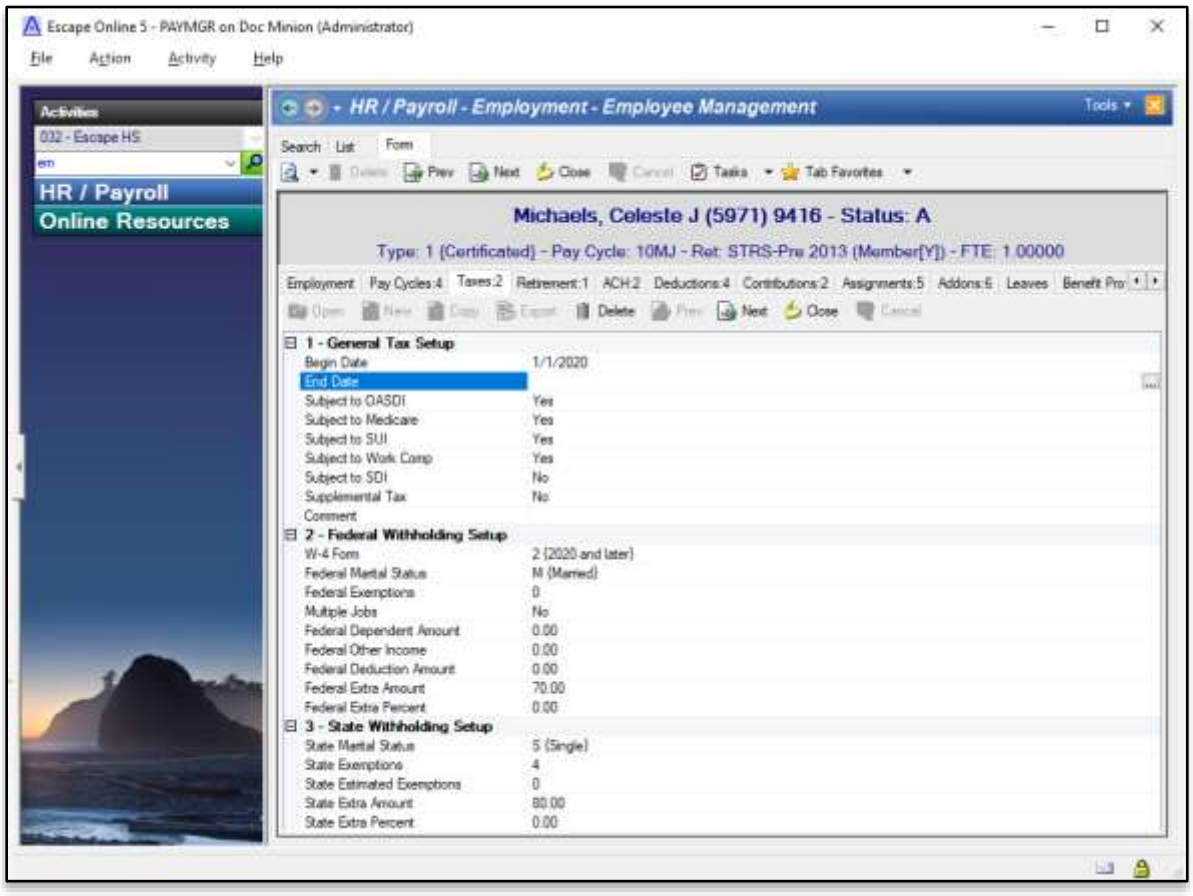
TAXES

This tab allows you to set up employee information for Federal and State Taxes, as well as OASDI, Medicare, SDI, SUI, and Work Comp. The system uses this information to calculate taxes and other deductions.

You will need to enter (and keep current) this information for each employee. The Tax record is selected by the pay compute is based on the pay date of the pay cycle.

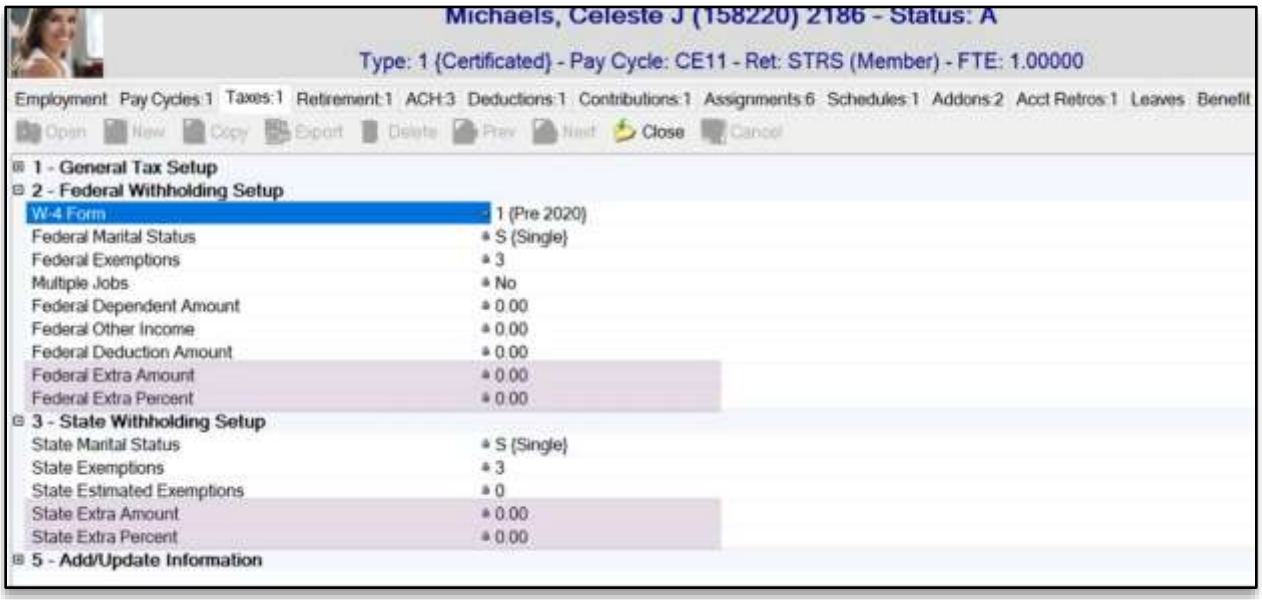
Link to Guide for inputting New W-4 Form: New_2020_W4_Form_Escape_Set_Up.pdf (scoe.org)

- **Begin/End Date** – (Required) Enter the date range for which the record is applicable. A begin date is required, but the end date may be left blank.
- **Subject To** – Enter NO or YES to define which taxes are subject to the employee. Defaults to:
    - OASDI - Yes
    - Medicare - Yes
    - SUI - Yes
    - Work Comp - Yes
    - SDI – No



- **Supplemental Tax** – Enter YES to tax employees using the supplemental tax rates for non-primary pay cycles.

- **Comment** – Enter a comment (e.g., information from the IRS). This is a searchable field.



FEDERAL WITHHOLDING SET UP

- **W-4 Form** - Select the timing of the W-4. This field drives the data entry requirements for the Federal Withholding fields. If set to 2020 and later, the following fields become available: Multiple Jobs, Dependent Amount, Other Income, and Deduction Amount. If set to pre 2020, those fields are locked.
- **Federal Marital Status** – Use the lookup window to select the status: married at a higher single rate (pre-2020), head of household (2020 and later) married, single and undeclared (calculated as single).
- **Federal Exemptions** – Enter the proper number of exemptions. Enter 99 to indicate exempt from tax, or 98 to use the Supplemental Tax flat percentage on all paychecks.
    - If you enter 98 or 99, you will not be able to edit the Extra Amount or Extra Percent fields. They will be locked.
    - You may also enter 97 as the exemption amount. This allows you to define an extra amount/percentage of taxes for the primary pay cycle. No taxes will be taken on non-primary pay cycles. (In order to take any SIT or FIT tax on non-primary payrolls, you will have to hand enter a deduction for FIT, SIT, or both.)
- **Multiple Jobs** - Enter Yes or No as indicated on the employee's W-4. (Default is No.) (2020 and later only)

- **Federal Dependent Amount** - Enter an amount the employee wants to claim for dependents. (2020 and later only)
- **Federal Other Income** - Enter an amount the employee wants to be withheld for other income. (2020 and later only)
- Federal Deduction Amount - Enter an amount the employee wants to claim as an additional deduction other than the standard deduction to reduce their withholding. (2020 and later only)
- Federal Extra Amount – Enter an amount the employee wants to be withheld in addition to the amount calculated by payroll. This amount will only be included on the primary pay cycle.
- Federal Extra Percent – Enter an additional percentage (of gross pay) to be withheld. This amount will only be included on the primary pay cycle.

STATE WITHHOLDING SET UP

- **State Marital Status** – Use the lookup window to select the status: head of household, married, single, and undeclared (calculated as single).
- **State Exemptions** – Enter the proper number of exemptions. Enter 99 to indicate exempt from tax, or 98 to use the Supplemental Tax flat percentage on all paychecks.
    - If you enter 98 or 99, you will not be able to edit the Extra Amount or Extra Percent fields. They will be locked.
    - You may also enter 97 as the exemption amount. This allows you to define an extra amount/percentage of taxes for the primary pay cycle. No taxes will be taken on non-primary pay cycles. (In order to take any SIT or FIT tax on non-primary payrolls, you will have to hand enter a deduction for FIT, SIT, or both.)
- **State Estimated Exemptions** - Enter additional exemptions for the employee.
- **State Extra Amount** – Enter an amount the employee wants to be withheld in addition to the amount calculated by payroll. This amount will only be included on the primary pay cycle.
- **State Extra Percent** – Enter an additional percentage (of gross pay) to be withheld. This amount will only be included on the primary pay cycle.

SPECIAL CONSIDERATIONS

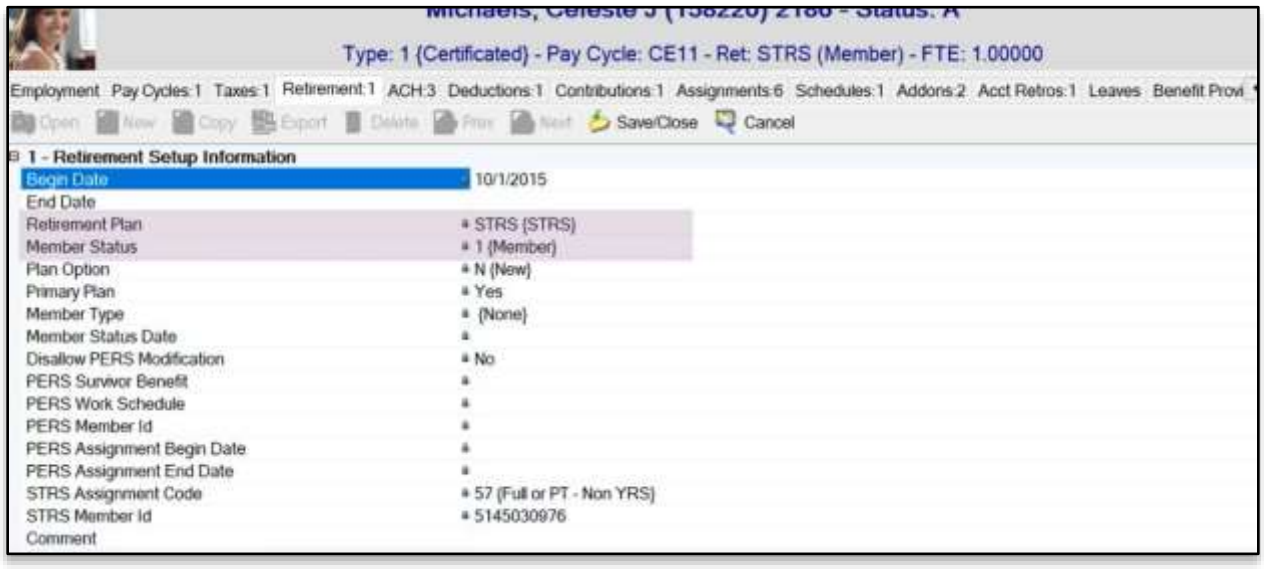
Extra SIT and FIT taxes are taken out of every primary pay cycle paycheck where there is enough pay to cover the amount. If the net pay is negative or the deduction would result in negative pay, the extra taxes will not be taken.

The OASDI Enabled flag in an employee's addon and/or assignment may be used to override the tax setup here. If the flag is set to NO, earnings from that assignment or addon will not be subject to OASDI.

Employee tax setup: If exemptions are set at 98, all earnings will calculate at supplemental tax rates

RETIREMENT

You will need to enter a Retirement record for each employee belonging to a retirement system (other than OASDI — this is set up as a deduction). For PERS, you can track non-members, including retirees and employees who are working toward qualifying for membership.



- **Begin/End Date** – Enter the date range for which the record is applicable. The begin date defaults to the first day of the month. A begin date is required, but the end date may be left blank. (Required)
- **Retirement Plan** – Use the lookup window to select STRS or PERS. (Required)
- **Member Status** – Enter 1 for a member or 2 for a non-member. (Note that if you change this from non-member to member, the Person record will be updated automatically.) (Required)
- **Plan Option** – Use the lookup to select the plan option (New or Classic) for this employee. (See the special considerations at the end of this section for more information.) (Required if member status is set to 1.)
- **Primary Plan** – Set to YES to designate this record as the employee's primary retirement record. If the employee has more than one active retirement plan, one of the plans must be designated as the primary plan. This plan will default for all assignments and addons unless a secondary plan is also set up and the assignment or addon is defined as having that plan as the default. (Required)

- **Member Type** – This field allows you to maintain and track several member statuses for both PERS and STRS, including the monitoring of retirees. This field works in conjunction with the Member Status field.
    - If the Member Status is 1, you can only set this field to blank, elected (E), qualified (Q), or existing (Y).
    - If the Member Status is 2, you can only set this field to retired (R) or non-member (N). In other words, this becomes a required field.

- **Member Status Date** – This date works in conjunction with the effective date. It is used to backdate a Retirement record. If the member status date is within the effective date, the person's retirement contribution is included in the payroll. The system treats a member status date as a new "begin" date for that Retirement record.
- **PERS Work Schedule** – Enter one of the valid values (see PERS manual for valid values).
- **PERS Member ID** – Public Employees Retirement System identifier. In general, this field is read-only from the Person record. However, if this is either a new employee that has never been in the system (does not have a Person record based on the SSN) or an employee with an existing Person record that does not have a PERS Member ID specified, this field is open for edit and will be saved to the Person record when the employee is saved. This field may be required, depending upon the system setup.
- **PERS Assignment Begin Date** – Enter the date the employee's PERS assignment starts. As of 2011, PERS requiring period dates to be the actual dates and not the first of the month when a PERS Appointment begins or ends.
- **PERS Assignment End Date** – Enter the date the employee's PERS assignment ends. If you are terminating a PERS employee, you will need to enter the assignment end date for correct PERS reporting. If the employee's PERS retirement record was created before 2011, you will have to end the record and create a new one so you can enter the assignment end date.
- **STRS Assignment Code** – Use the lookup window to select one of the valid values.
- **STRS Member ID** – State Teachers Retirement System identifier. In general, this field is read-only from the Person record. However, if this is either a new employee that has never been in the system (does not have a Person record based on the SSN) or an employee with an existing Person record that does not have a STRS Member ID specified, this field is open for edit and will be saved to the Person record when the employee is saved. This field may be required, depending upon the system setup.

DEFAULTS FOR NEW EMPLOYEES

If you add an employee that has a Person record (e.g., the person is employed at another district), The system will default the plan information using the following logic:

- If the employee is new (no Person record):
- If the Member Status is 1, the Plan Option becomes required.
- If the Member Status is 2, the Plan Option defaults to blank.
- If the employee has one plan (PERS or STRS) in the Person record, the system will default the fields from retirement setup in the Person record.
- If the employee has two plans in the Person record, the system will default the fields from the retirement setup which is marked as Member.
- If the employee has two plans in the Person record and both plans are marked as Member, the system will not default any fields, instead will present a warning, "This employee has two plans set up in their Person Record."

DUAL RETIREMENT

Most employees have only one retirement system.

However, there are circumstances where an employee needs to be a member of STRS and PERS simultaneously. For example, an employee has a classified assignment (e.g., instructional aid), and is a substitute teacher also.

The setup is fairly easy:

- Enter two different retirement records (i.e., you cannot set up two PERS) in the employee's payroll setup. One retirement system must be defined as the primary, the other as secondary.
- Enter the retirement plan in the Position Type record. This defaults the secondary membership into the assignment if the employee has dual setup.
- Enter the retirement plan in the Addon system record. This defaults the secondary membership into the addon, if the employee has dual setup.

The retirement plan "default" can be overridden in the assignment or addon, but not for addons that adjust positional pay rates (Set Rate Option set to YES). In the case where an addon has no retirement system specified and the employee is in both systems, the system uses the employee's primary retirement system.

For your convenience, the Adjust Payroll summary section displays SINGLE or DUAL, the retirement system name (PERS or STRS), the member status, and whether or not the retirement system is primary or secondary for the employee.

ADJUSTING RETIREMENT

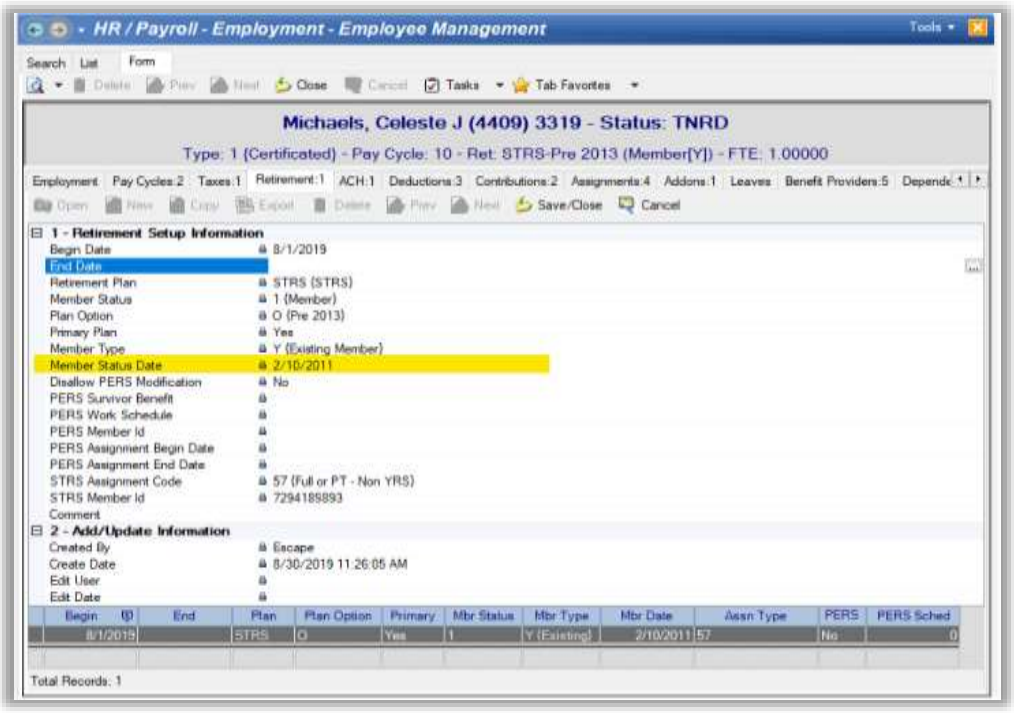
You can adjust retirement in the Earnings, Deductions, or Contributions tabs.

Rather than explain all these fields here, we feel that users adjusting retirement information for employees should be experts and the fields in question will be obvious to them. The exact fields that you need to fill in depends on the retirement system in question. This will generally default for each employee.

Now, you can backdate a retirement record to a previous pay period when an employee needs an active retirement record prior to the current pay period (the employee has been paid or has data being processed in the previous pay period of the same pay cycle).

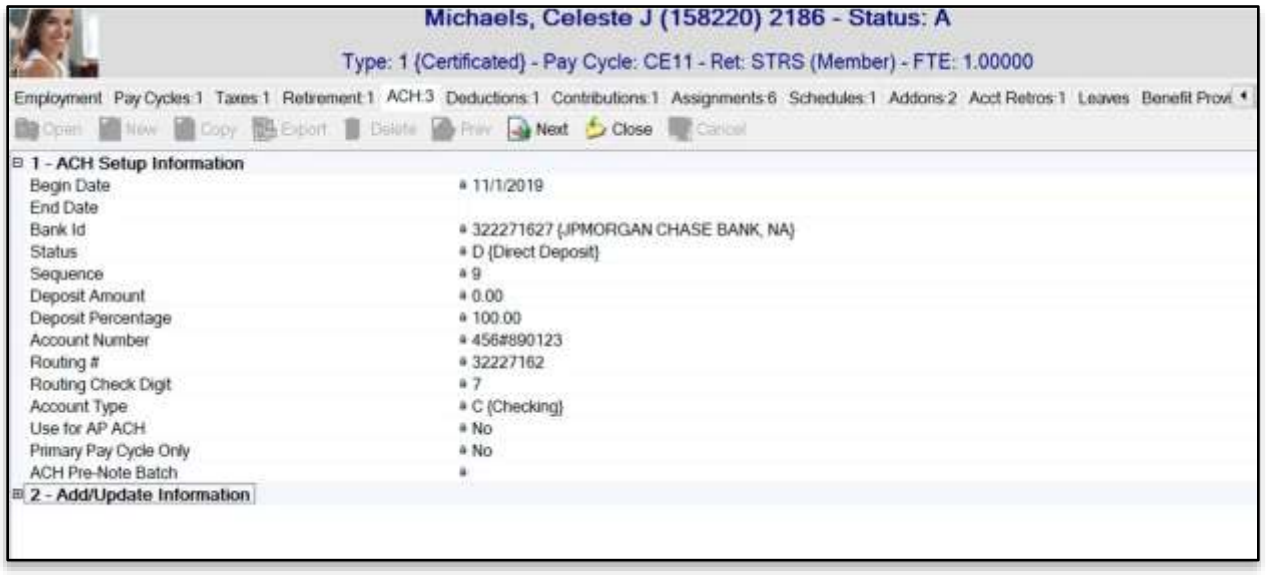
The new **Override Begin Date** task is available on the Retirement Tab of the Employee record. This task empowers users to backdate the retirement Begin Date. For example, you have a retiree with a retirement record that ended last year who is processed on a BenOnly pay cycle in March (pay period 3/1-3/31). You have rehired the employee as a sub for March so you need to add that employee to a supplemental pay cycle in April. Normally, the system would not allow you to backdate the “new” Retirement record’s Begin Date to March, but with the Retirement Override task, you could change the Begin Date to allow for the pay on the April supplemental.

Previously, if you needed to backdate a retirement record under these circumstances, you had to contact Frontline Support to backdate the record.



ACH (Direct Deposit)

The system has the ability to send deposit information directly to banks. The ACH record defines the bank(s) and accounts to which an employee wants all or portions of the net paycheck to be distributed. The process may include pre-note processing or not, depending upon system setup.



These records should be entered for any employee that wants to have some or all of their net pay deposited directly. The process is defined by the ACH (Automated Clearing House) standards for direct deposits.

It is best to request a cancelled check from an employee wanting to set up direct deposit. This will provide you with both the bank's ACH number and the employee's account number. You may set up multiple records for an employee, so that some amounts go to separate banks and/or accounts. The amounts can be fixed or percentages.

When creating ACH records that conflict (like when an employee is changing banks or accounts), you will receive a warning. <u>All warnings must be resolved before running payroll.</u>

When copying ACH records, please note that the Sequence field <u>does not copy</u>.

You cannot delete an ACH record that has been used in payroll processing or for AP ACH.

- **Begin/End Date** – Enter the date range for which the record is applicable. A begin date is required, but the end date may be left blank (open ended). (Required)
- **Bank ID** – Use the lookup to select the appropriate bank. If you do not find your bank on the list, it must be added – Contact SCOE Business Services to add a new bank. (Required)

- **Status** – Read only. The system automatically sets this field to D (direct deposit) if the organization is not setup to create pre-notes. If the organization is setup to create pre-notes, the system sets this field to P (pre-note) and then switches it to D (direct deposit) once the pre-note is generated.
- **Sequence** – Enter 9 for employees depositing their entire checks to one account. Take care in setting the sequence. If two records have the same sequence, the system will not know which record to use first and adverse results may occur. See Special Considerations at the end of this section for information about partial deposits or employees that want to deposit their net pay to more than one account. (Required)
- **Deposit Amount** – If you want a fixed amount of the employee's net to go to this account, enter that fixed amount. If you make an entry in this field, the Deposit Percentage is set to read-only. You can enter several fixed amounts. Any remaining balance will be cut to a check. (Required)
- **Deposit Percentage** – Enter 100 if the entire net pay is going to one account. Otherwise, if you want this account to get a specific percentage of the employee's net, enter that percentage. If you make an entry in this field, the Deposit Amount is set to read-only. No checks are cut if a percentage record exists. (Required)
- **Account Number** – The employee's bank account. (Required)
- **Routing Number and Check Digit** – The ACH Bank Code for the employee's bank. This was automatically entered when you selected the bank.
- **Account Type** – Use the lookup to select checking or savings.
- **Use for AP ACH** – Set this to YES to use this record for ACH payments from Accounts Payable. (Only applicable when status is D. In other words, cannot be used for prenotes.)
- **Primary Pay Cycle Only** – Set this to YES to use this record exclusively on the employee's primary pay cycle. For example, if it is set to YES, then the ACH record will be ignored on any pay cycles that are not the employee's primary, defaulting all of the pay to the other ACH records. If there are no other ACH records, the non-primary pay will be processed as a check. (Required)
- **ACH Pre-Note Batch** – Read only. This is the ID of the batch that contained the employee's pre-note for this ACH record. The system automatically enters the number when an employee's ACH is included in the pre-note file generated during payroll processing.

SPECIAL CONSIDERATIONS

The sequence and amount/percentage fields work together when an employee has multiple direct deposits. The sequence defines the order of the deposits, with each successive sequence using the balance of the net pay. The system always starts at sequence 1.

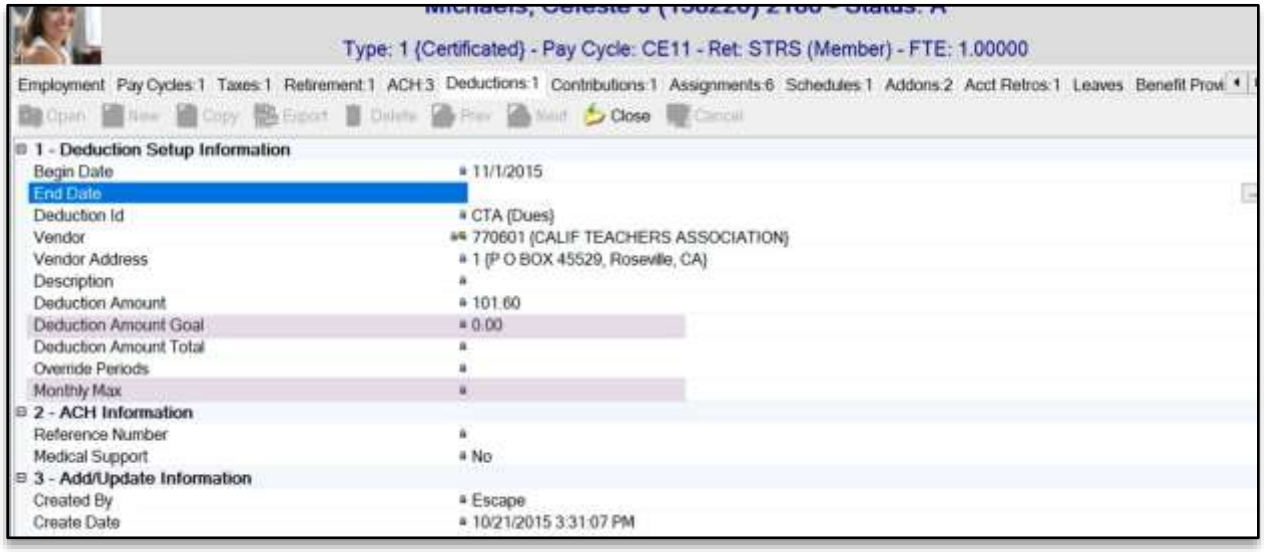
For example, if an employee has four active ACH records setup where the first two are fixed amounts ($400 and $100), the last two are percentages (50% and 100%), and their net pay is $1,000. The system would work as follows:

- Sequence 1 is $400. (Amount deposited is $400.)
- Sequence 2 is $100. (Amount deposited is $100.)
- Sequence 3 is 50% (half of what is left of the net pay). (Amount deposited is $250.)
- Sequence 9 is 100% (all that is left of the net pay). (Amount deposited is $250.)

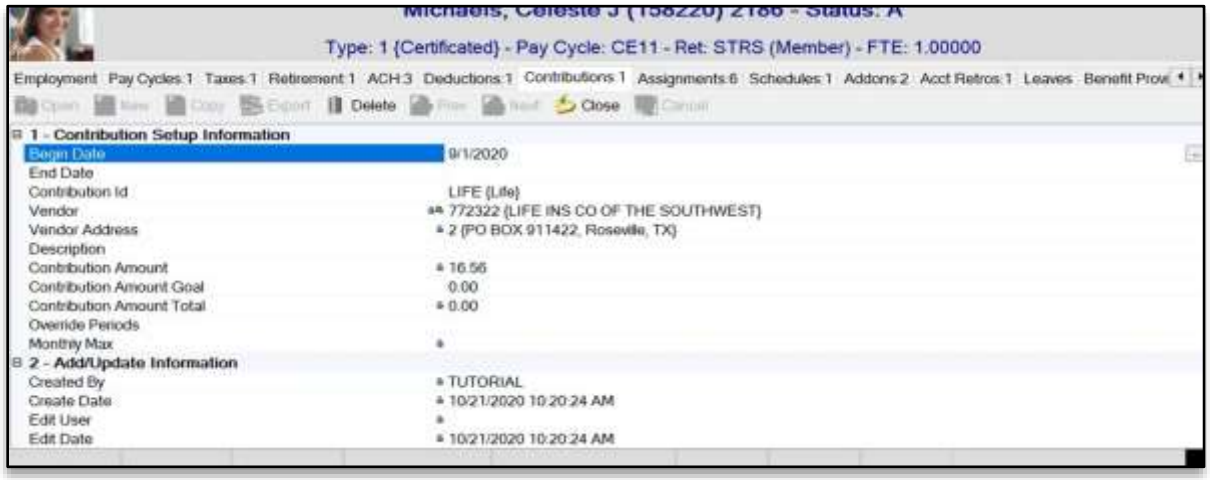
DEDUCTIONS/CONTRIBUTIONS TABS

Any voluntary or involuntary deduction or contributions specific to the employee are entered in these two tabs. Examples are charitable contributions, garnishments, alternative retirement, etc.

These records point to org-level deduction and contribution records, which detail how they will affect pay.

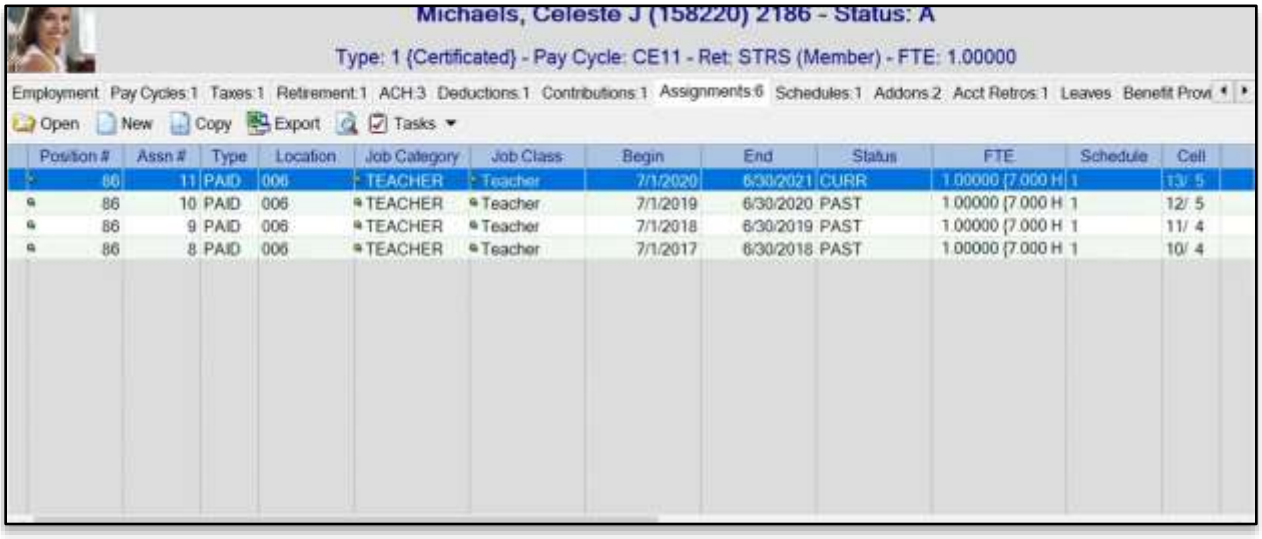


- **Begin/End Date** – Enter the date range for which the record is applicable. A begin date is required, but the end date may be left blank (open ended). (Required)
- **Deduction/Contribution ID** – Use the lookup to select the deduction/contribution (Required)
- **Vendor** – Use the lookup window to select the vendor. Remember, you must enter at least two characters to open a vendor lookup window. (Required)
- **Vendor Address** – Use the lookup window to select a different address than the one defaulted (remit to) when you selected the vendor. (Required)
- **Description** – Enter a description for reports, ACHs and Checks.
- **Amount** – Enter the amount to be deducted or contributed each month.
- **Goal** – If you want to specify a maximum amount to be deducted or contributed, enter that amount here. Once the goal is reached, deductions/contributions will stop.
- **Total** – The total amount deducted (or contributed). This is a read-only field.
- **Override Periods** – Enter the months (comma separated) to have the contribution/deduction calculated for those pay date months.
- **Monthly Max** - Enter the monthly maximum for the pay period, overriding the amount set in the organization deduction/contribution.
- **ACH Information** – This applies to deductions only.
- **Reference Number** –. This is a mandatory field for electronic child support payment processing.
- **Medical Support** - This is a mandatory field for electronic child support payment processing.



ASSIGNMENT

The assignment tab is where you assign positions. There are several types of assignments. Each of these types has four possible statuses: past, current, future, or canceled.

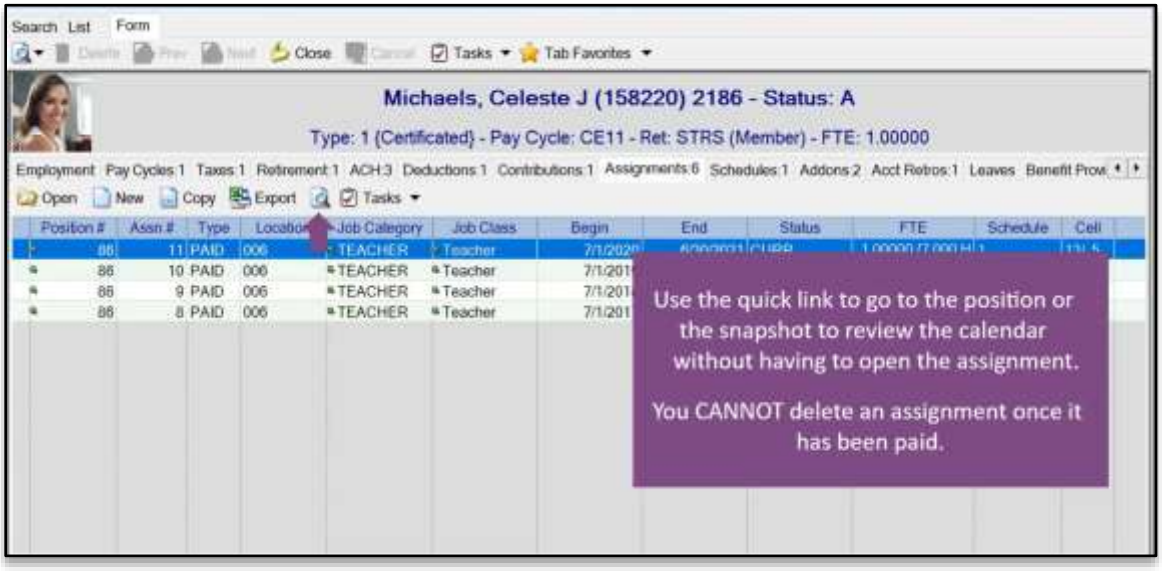


- **Extra** – Employee works over 1.0 FTE. The amount over 1.0 needs to be in this type of assignment. This ensures correct STRS reporting. For example, this is used for a teacher that is working an extra period (6/5 of a day).
- **Leave of Absence (LOA) –** Employee is on unpaid leave from a position. The assignment does not generate pay or get included in salary or encumbrance projections.
- **Leave of Absence Paid (LOAPaid)** – Employee is on a paid leave of absence from a position. The assignment has a salary and is included in salary or encumbrance projections.
- **Paid** – Employee is assigned to a position for a period of time. The assignment has a salary and is included in salary or encumbrance projections.
- **Timecard** – Employee is assigned to a position for a period of time. The assignment is paid from a timecard. The hours are entered through the **Adjust Payroll** activity.
- **Unpaid** – Employee or volunteer is assigned to a position for a period of time. The assignment does not generate pay or get included in salary or encumbrance projections.

When you create an assignment, several fields default from the position record, including:

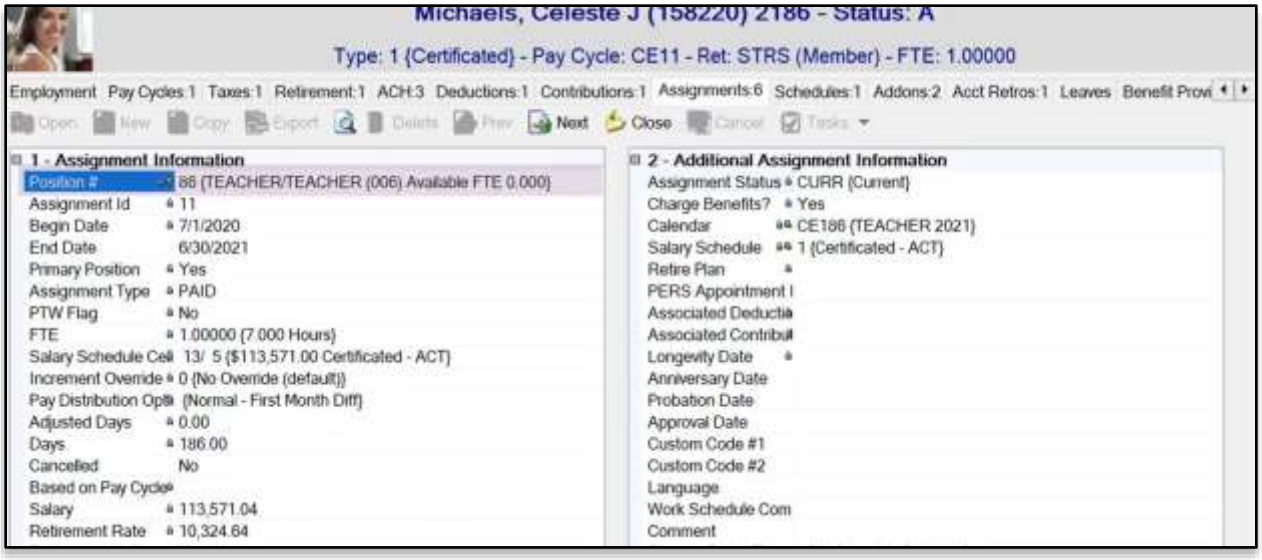
- Bargaining Unit (cannot be changed)
- Job Category (cannot be changed)
- Job Class (cannot be changed)
- Location (cannot be changed)

- Calendar
- Salary Schedule

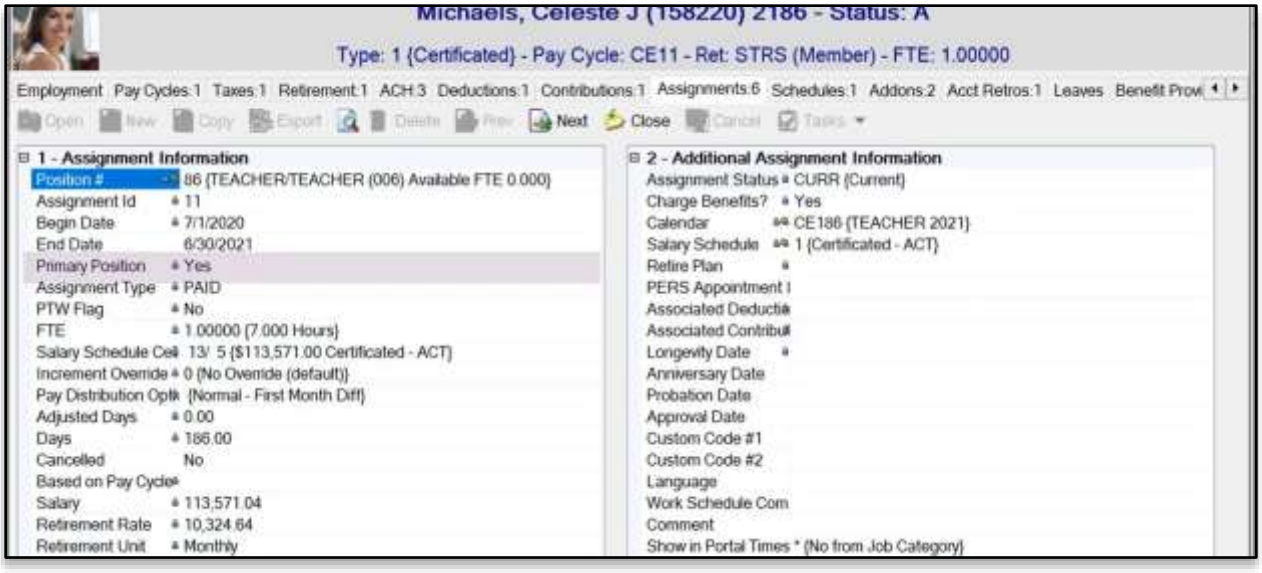


ASSIGNMENT INFORMATION

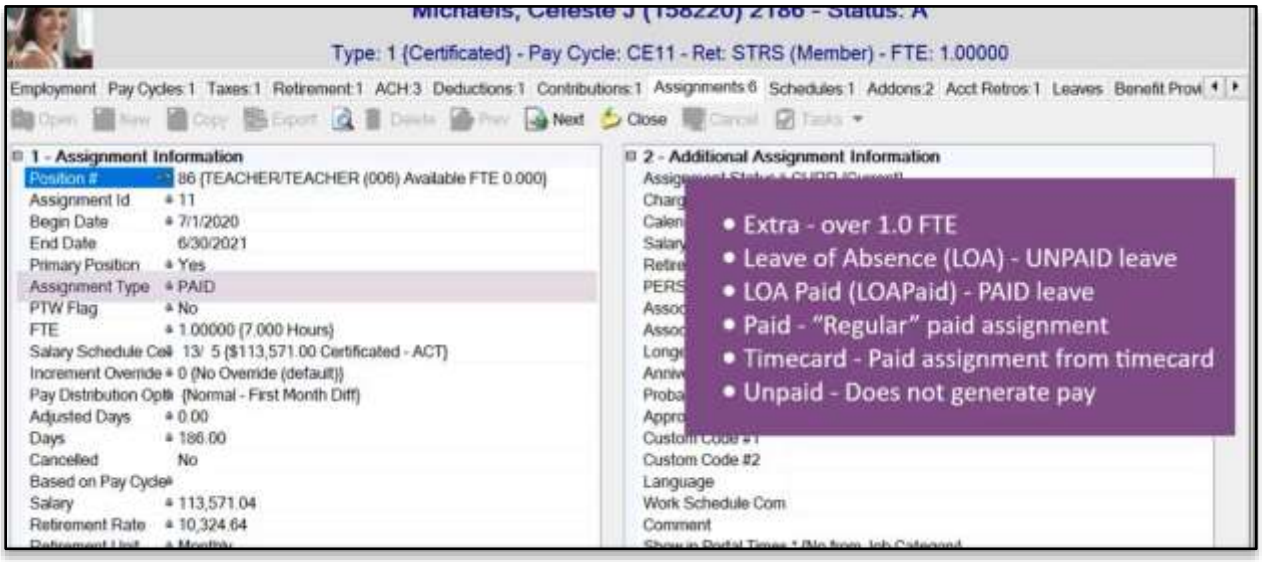
- **Position Number** –You must select an active position number, as of the begin/end dates. Once you enter the number, several fields will default from the position record.
- **Assignment Id** – The assignment Id will automatically be assigned when you save the entire record.
- **Begin/End Date** – Enter the date the assignment begins. The end date will automatically default to the end of the fiscal year. (required)
    - If you do not specify a position number or an account number in a system addon and the addon has the Use Position flag set to YES and the Set Rate Option to blank, the addon will use the primary position's accounts.
- **Assignment Type** – Defaults to paid. Use the lookup window to indicate the type of assignment (e.g., paid, vacant, leave of absence, etc.).



- **Primary Position** – Defaults to YES. Use the lookup window to select NO if this is not the primary position for the employee. If an employee has assignments, one of them must be defined as the primary position. Employees can only have one primary position at a time. The primary position or primary assignment is usually the assignment with the greatest FTE. In cases where an employee has equal FTE in multiple assignments, many clients choose the assignment with the largest pay rate. The primary position is used throughout the system for calculations and display purposes:
    - The primary position information is shown on the Employee Management List.
    - The primary position information is used in reports.
    - If you grant leaves for all assignments (the Leave Grant Using Primary Assignment flag in the Organization record is set to Use All Assignment Leave Groups), the employee's primary position leave groups will be used to display the setup and balances on the Leaves Tab in Employee Management.
    - If you grant leaves by primary assignment (the Leave Grant Using Primary Assignment flag in the Organization record is set to Leave Grant Using Primary Assignment), the employee's default leave group will be based on the job category/class of the primary position. (Leave group can be overridden on the Leaves Tab in Employee Management.)
    - The bargaining unit of the primary position is used for benefit proration. (Proration can be overridden on Benefit tab in Employee Management.)



- **Assignment Type** – Defaults to paid. Use the lookup window to indicate the type of assignment (e.g., paid, vacant, leave of absence, etc.).



- **PTW Flag** – Defaults to No. Use the lookup flag to indicate that the assignment is to be used as "Percent Time Worked." It is for employees that are part-time but work full days. When set to yes, The system will multiply the number of days by the FTE. For example, a part-time employee (FTE is 5.92 hours or 0.74 FTE) works MWF 8-5 instead of working M-F 8-12. The calendar for this assignment is 190 days. If the PTW Flag is set to No, the total number of days is not factored by FTE. Thus, it shows 190 days. If the PTW flag is set to yes, the number of days is factored by FTE. Thus, it shows 140.60 (190 * 0.74 = 140.60). This flag also affects the units that default when entering in leave usages. If the PTW field is set to No, then the days

that default in leave entry will be factored by FTE (5.92 hours). If the field is set to Yes, then the entry will default as a full FTE (8 hours).

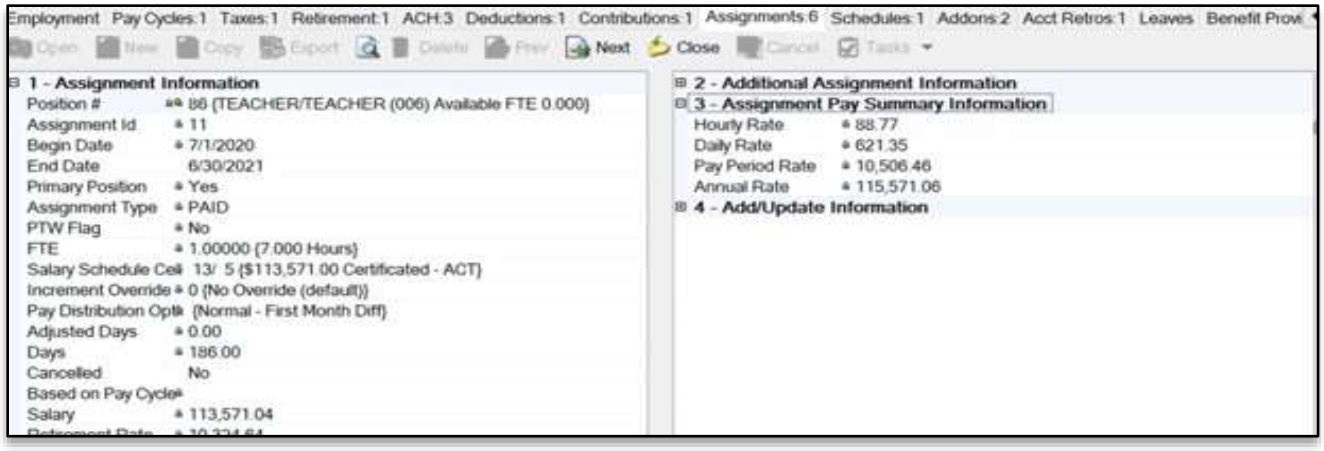
- **FTE** – Enter the amount of time worked in the position, which must not exceed the authorized and available FTE, and in no case exceed 1.0. On the other hand for Paid and Paid LOA assignments, the FTE must be at least 0.01.
- **Actual Daily Hours** – Access to this field is controlled by the job class. If the job class for an assignment has the Allow Hours Per Day Override set to YES, users can edit the field. If the job class for the assignment does not have the flag set to YES, the field is blank and read-only. If no job classes in the organization have the flag set to YES, the Actual Daily Hours field in the assignment is suppressed (does not appear on the form) for that organization.
- **Salary Schedule Cell** – Use the lookup window to select the cell. You will receive a warning if you attempt to select a cell outside of the range defined in the job class.
- **Increment Override** – Use the lookup to override the step/column movement for this assignment (e.g., Y rated) to "skip" the first year (increment after the first year) or never increment. This field is applicable only if the Anniversary Option in the Bargaining Unit record is set to No (increment on 7/1). It is not applicable if the Anniversary Option is set to increment on the anniversary.
- **Pay Distribution Option** – Use the lookup to equalize pay (Y). Otherwise, leave blank for normal/first-month difference. This cannot be set to blank (Normal) if the assignment covers the entire year and has a manual calendar and days do not match contract days.
- **Adjusted Days** – Access to the field is controlled by the calendar and the dates of the assignment. If this assignment is PTW (part-time worker), you can designate what type of time you are entering: based on PTW or full FTE. If you are entering a number that is based on PTW, the number will be accepted as is. If you are entering a number that is based on FTE, you enter the number and then the word FULL (i.e., 5 full), and the system will calculate your number as FTE. Let’s use a PTW assignment with 0.5 FTE as an example. To enter 5 part-time days, you would enter "5" and the system would factor by FTE: 5 {2.5 full days}. To enter 5 full days, you would enter "5 FULL" and the system would use full days: 10.00 {5.00 full days}.
- **Days** – Access to the fields is controlled by the calendar and the dates of the assignment.
- **Cancelled** – Set to YES to cancel an assignment.
- **Based on Pay Cycle** – Use the lookup window to set an "alternative" pay cycle. The system uses this to find a matching pay period based on the employee's primary pay cycle using the primary pay cycle's period from and thru dates. From this, the Equalized Pay Distribution option and earnings periods will be picked up and used to calculate pay for this assignment. The system does not assign the pay to this pay cycle; instead, The system uses the pay cycle for determining how many periods to divide this assignment’s earnings. This flag cannot be set if the employee is on a manual calendar!
- If leave granting by assignment is turned on, several fields appear read-only. To change the fields use the Change Leave Overrides task. You can use the Change Leave Overrides task at

any time except if the assignment has been canceled or does not have FTE. If you do change these fields, a history record will be written.

- **Leave Grant FTE** – This displays the FTE granted for leaves for this assignment. It overrides the employee's FTE used to calculate leave grants.
- **Leave Base Date** – This displays the base date used for leave granting for this assignment. The system will always use this date first for granting for this assignment. If this is left blank, the system will use the leave base date for the employee.
- **Leave Group Code** – This displays the leave group used for leave granting for this assignment. It overrides the leave group code override or the leave group code of the employee's primary position.
- **Leave Years of Service** – This displays the years of service for leave granting for this assignment.

AUTOMATICALLY GENERATED

- **Salary** – Salary for this assignment.
- **Retirement Rate** - Retirement rate last used for this assignment.
- **Retirement Unit** – Retirement unit last used for this assignment as defined in the system addon, calendar, or salary schedule.
- **Pay Cycle** –The pay cycle on which the assignment was last paid.
- **Last Period Paid** – The last period on which this assignment was paid.
- **Paid Thru Date** – The last paid thru date for this assignment.
- **Paid Amount** – The last paid amount for this assignment.
- **Paid Days** – The number of paid days for the last period on which this assignment was paid.
- **Assignment Pay Summary Information** – Hourly Rate, Daily Rate, Pay Period Rate, Annual Rate



ADDONS

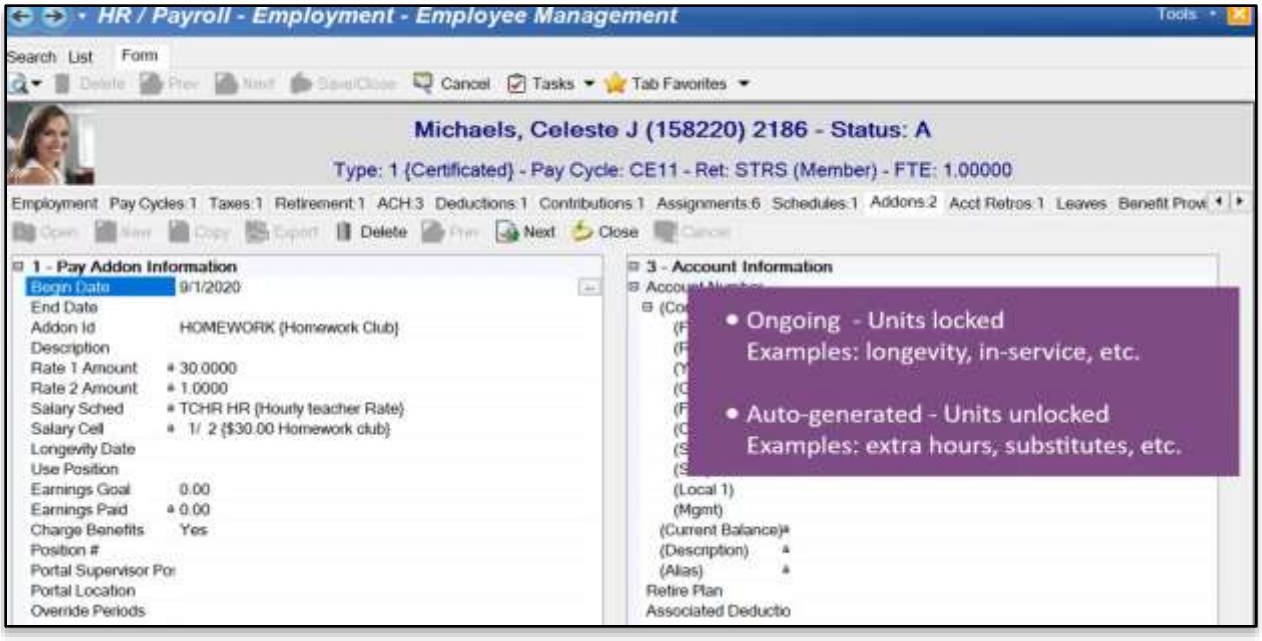
Addons are any employee pay that does not come from position assignments. Examples are stipends, longevity, substitutes (non-regular employees), etc.

There are several concepts to remember when adding an addon:

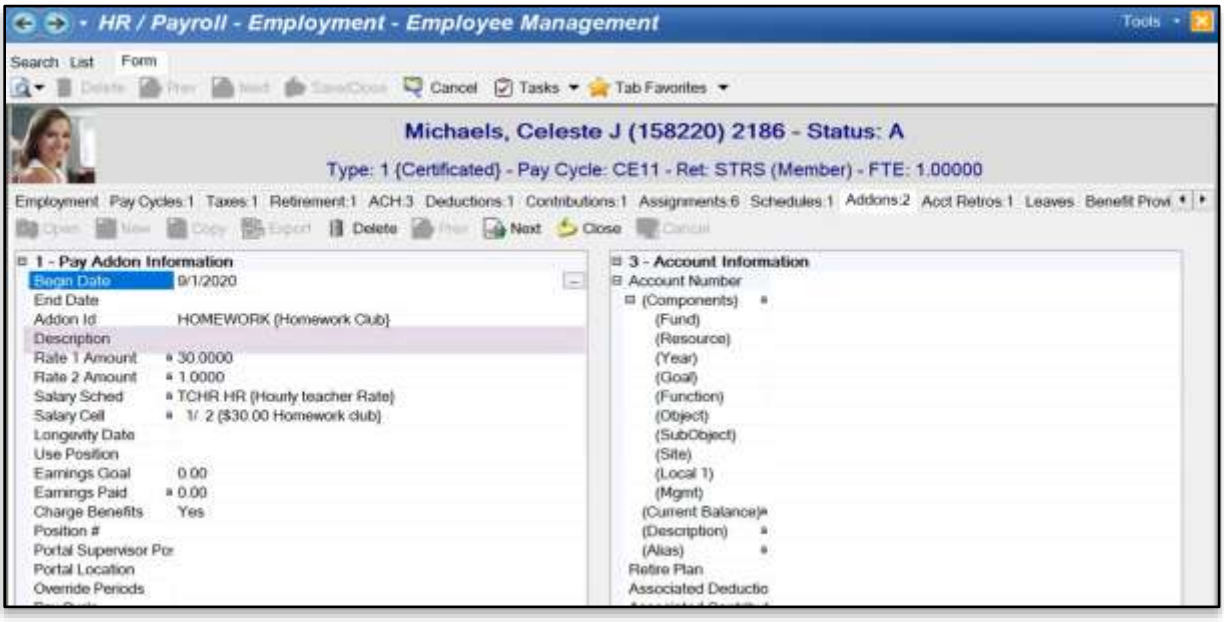
- The employee must have a primary pay cycle.
- You cannot delete an addon that has been paid.
- The begin date for an addon should be **AFTER** the last paid through date. However, there are special circumstances where you would want the date to be before the last paid through date (for example, W2 changes). As long as the pay cycle has open periods, you may backdate and assign the addon to that pay cycle and make changes.
- If you want to use the Earnings Goal for annual on-going addons, use the mass change activity to 'add' the addon for each new year (because the goal from the existing addon for the previous year will have been met).

If you are having trouble saving the addon, *check the account field*. It may be required.

- **Begin/End Date** – Enter the date the addon begins and ends. The begin date defaults to the pay cycle period's from date for the next open pay cycle period. If you leave the end date blank, the addon will remain open year after year.
- **Addon ID** – Use the lookup window to select the addon.



- **Description** – Enter a description of the addon. This defaults from the system addon

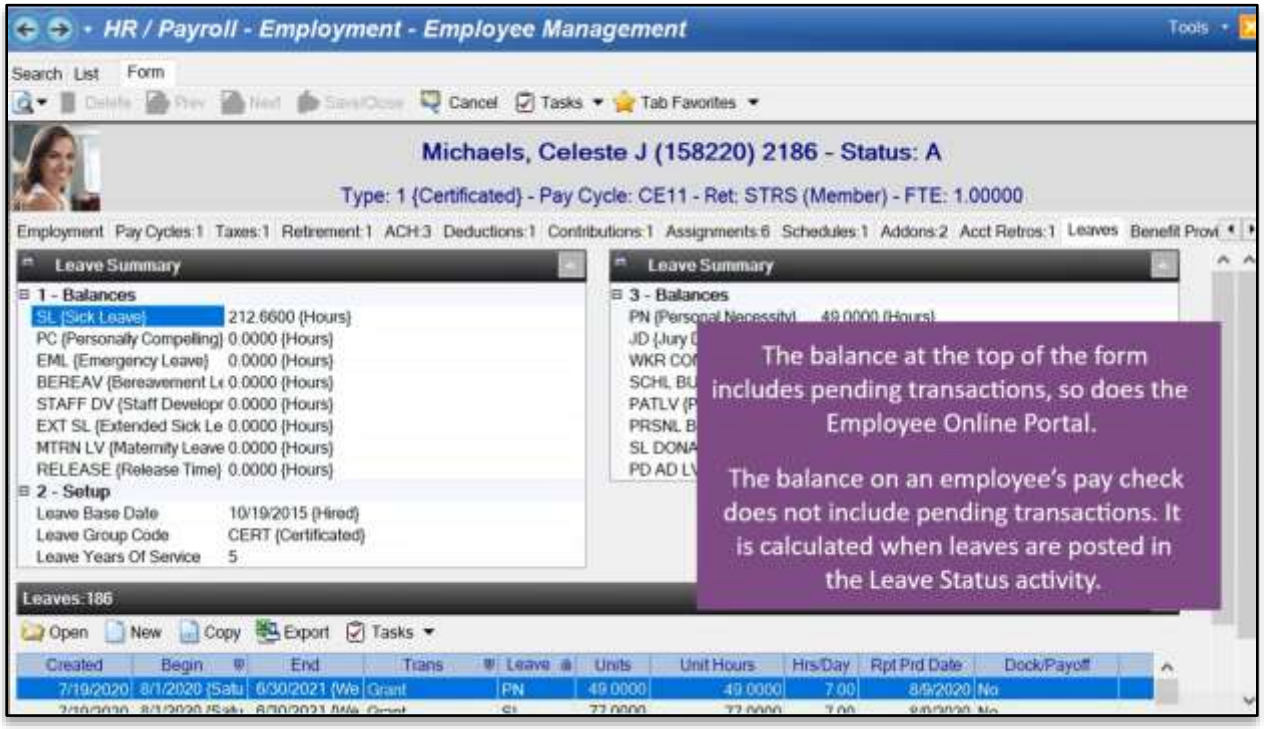


- **Rate 1 and Rate 2 Amounts** – The pay from this addon is controlled by the Rate 1 Amount and the Rate 2 Amount. These fields default from the addon setup.
- **Salary Schedule and Salary Cell** – Enter the salary schedule and cell if the system addon is setup with question marks for the salary schedule and the addon does not set rate or use position. Otherwise, these fields cannot be changed.
- **Longevity Date** – Enter a date for longevity. This date is used in determining longevity for extra pay for addons and assignments. The system uses the following logic to determine longevity.

        - Use the longevity date in the addon and assignment to determine longevity. (If the longevity addon is in the assignment salary schedule, the assignment longevity date will be used.)
        - If those are blank, use the longevity date in the employee record.
        - If that is blank, use the Base Date in the employee record.
        - If that is blank, use the Hire Date in the employee record.
- **Use Position** – Defaults to YES to tie an addon to a position. Set this to NO to disassociate the addon from the position so that the addon will not pick up setup — retirement, job class, accounts, etc. — from a position. Earnings Goal – Enter a maximum amount to be paid, if appropriate. Once the goal is reached (see Earnings Paid field), pay from this addon will stop. Districts may use this field to control stipends, benefit payments, longevity, etc.
- **Earnings Paid** – The amount paid for this addon for locked pay periods (i.e., Locked, Submitted, Approved, Processed, Closed).
- **Charge Benefits** – Use the lookup window to indicate whether or not benefits should be charged to this addon's accounts. (Defaults from the Organization Addon Setup.)
- **Position #** – Use the lookup window to select the position if appropriate. This field has two purposes:
        - Enter a position number to cause the expense of this addon to be linked to a specific position, instead of the primary position. It should also be noted that when an employee changes positions, this field would have to be revisited.
        - Enter a position number to set the retirement pay rate (applicable to PERS with a contribution code of 1, 3, 11 or 13) and job category/class to the last pay rate for the position specified. The job category/class is used for seniority adjustments. If you do not specify a position number or an account number and the addon is set up with the Use Position flag set to YES and the Set Rate Option to blank, then the addon will use the primary position's accounts. Similarly, if the addon is set up with the Use Position flag set to NO and the Set Rate Option to blank, then the addon will distribute to all position accounts.
- **Override Periods** – Enter the months this addon will be paid, overriding the system addon record. You can type the entire name of the month or just a few letters. If you want to enter more than one month, separate the months with commas (e.g., Jan, Feb, Apr). Before you enter any overrides, be sure to check the system addon record to see if it is necessary.
- **Pay Cycle** – Use the lookup window to select a pay cycle if this addon is to be paid on a different pay cycle (e.g., variable or supplemental) than the employee's primary pay cycle (the one defined on the Pay Cycle tab of the Employee record). If this is left blank, the addon will be paid along with positional pay on the employee's primary pay cycle.
- **Job Class/Category** – Use the lookup window to select the job category/job class to which this addon belongs. If the field is locked, you cannot change it.

LEAVES

This tab displays a summary of leave balances and a list of leave transactions. If there are multiple leave groups (because you are granting for all assignments), the employee's primary position leave groups will be used to display the setup and balances.

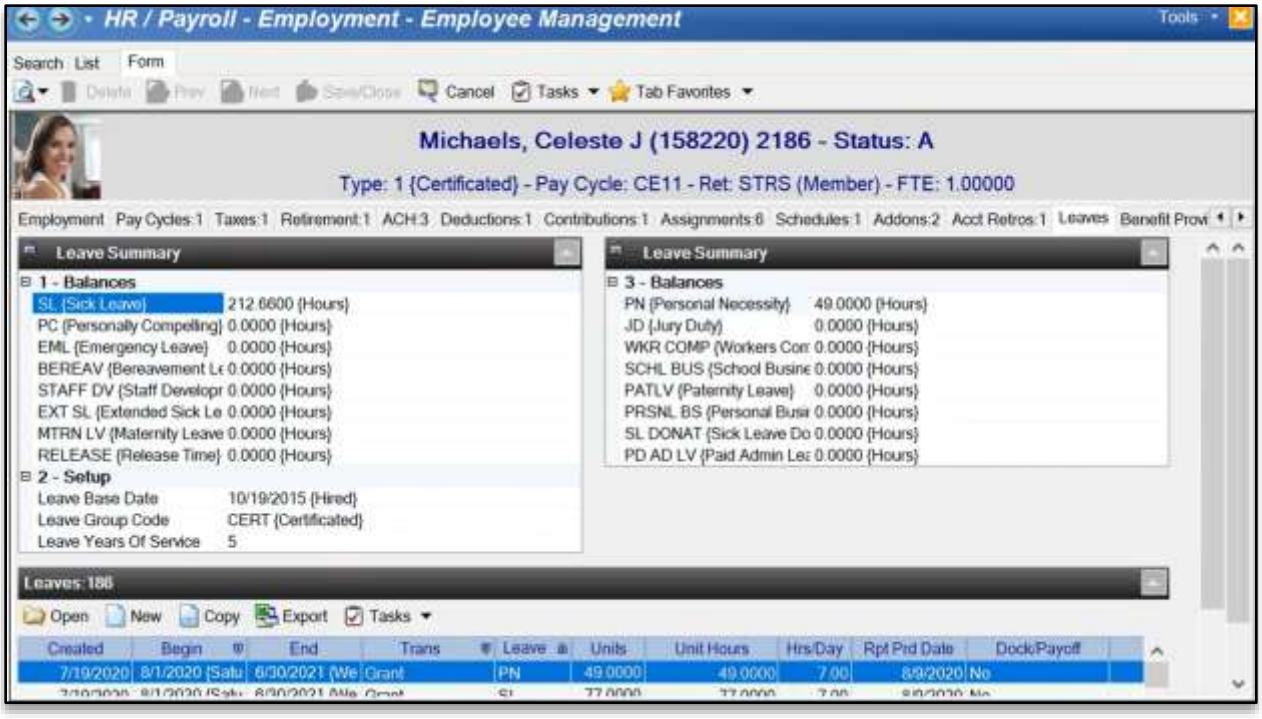


The Leaves tab has a summary at the top and then a list of all leave transactions.

Leave Summary

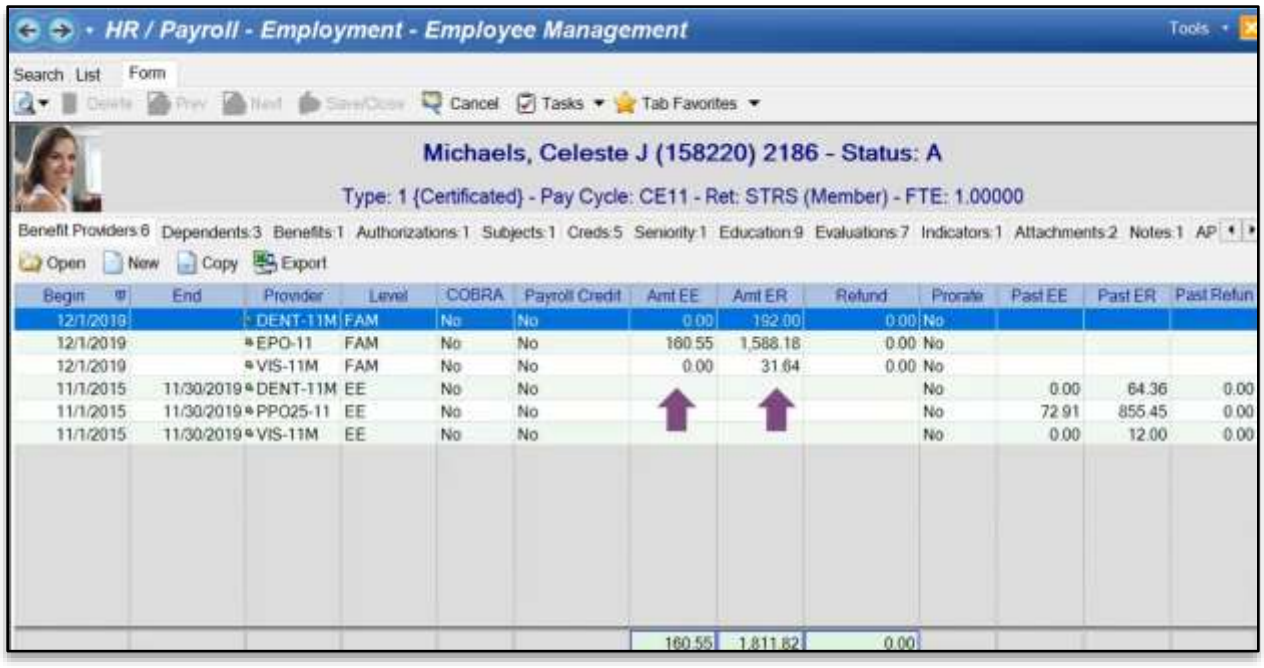
- **Balances** – Summarizes up to 16 leave balances. The balances are displayed in one or two categories across the top of the form, depending on how many leave balances the employee holds. If a max accrual is defined (in the Leave Balance Profile), the maximum accrual will be displayed also. If a leave balance is negative, it will be displayed in parentheses.
- **Setup** – Displays the employee's leave setup. This may need to be updated when an employee changes status (example - (HFA) a sub gets hired as an employee)
- **Other Balances** – Summarizes any transaction balances that are not part of the employee's leave balance profile setup.

The list shows dates, transaction type, leave type, hours/days, etc.



- **Balance Forward** – Sets an amount for an employee's leave balance. Balance forward transactions are created through the roll-forward process at the beginning of the fiscal year. The amount depends upon setup. It may be the sum of prior transactions (no limit on leave carryover), the max carryover amount, or zero because there was a payout or the leave balance was set up to not carry over. Balance Forward transactions cannot be edited in the Leaves tab in **Employee Management**.
- **Grant** – Adds to an employee's leave balance. Most employee grants are created automatically monthly or annually by the Grant task in the **Leave Status** activity. However, grants can be created manually in the **Leave Transaction** activity for employees with a leave group that begins with HFA (Healthy Families Act). Grant transactions cannot be edited in the Leaves tab in **Employee Management**.
- **Usage** – Subtracts from an employee's leave balance
- **Adjustment** –Adds or subtracts from an employee's leave balance

BENEFIT PROVIDERS



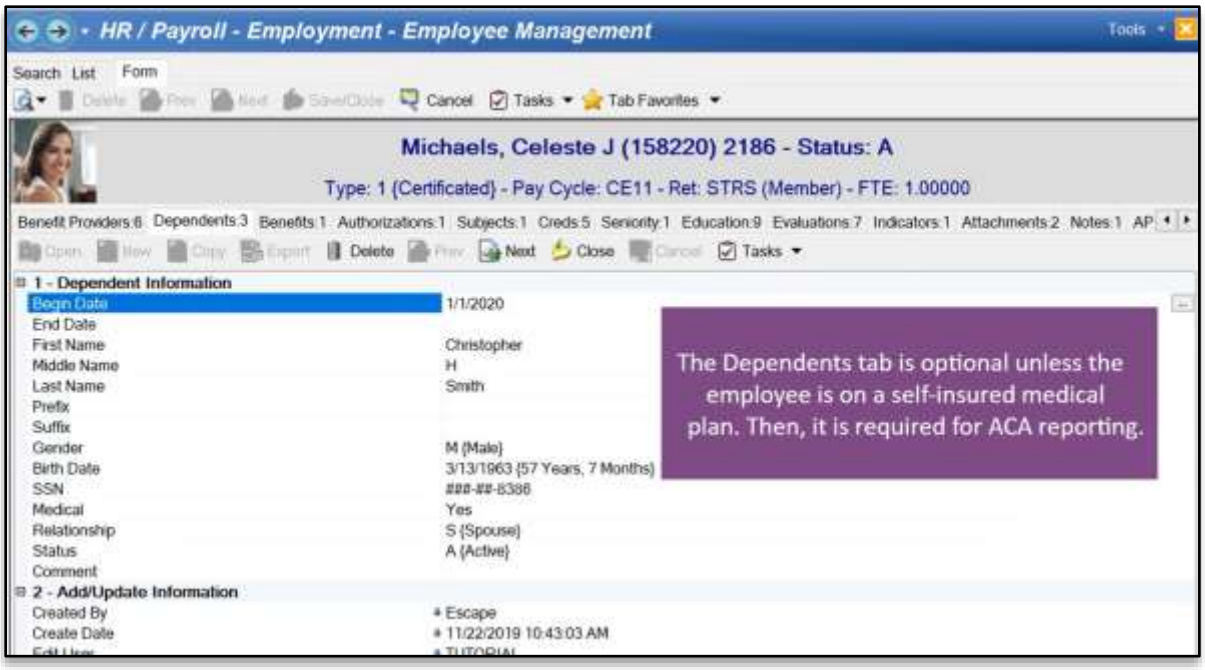
The Benefit Providers tab lists the employee's chosen provider "packages."

- **Begin/End Date** – Enter the date range for which the record is applicable. A begin date is required. The end date can be blank (open-ended). (Required) If you change the end date, the coverage end date will reflect the change.
- **Provider** – Use the lookup window to select the provider. (Required)
- **Level** – Use the lookup window to select a valid provider coverage level. This establishes the price and type of coverage. These are unique to each provider and are defined in the Benefit Levels setup records. (Required)
- **COBRA** – Enter YES if this is a COBRA benefit, excluding this provider from the payroll computation.
- **Coverage Begin/End Date** – If the Benefit Provider is set up to prepay (Prepay Benefits flag in the Benefit Setup-Benefit Provider record is set to YES or blank AND the Prepay Benefits flag in the Organization record is set to YES), the coverage dates will default to the employee's Benefit Provider Begin Date, plus one month. You may change the date to override the benefit provider and/or the begin/end dates entered above. This affects the calculation for coverage in the Pay60 and ACA 1095 reporting.
- **Payroll Credit** – Enter YES if this benefit should be treated as a credit. Generally, this is used to process a credit for one month when an employee changes their benefits after the fact.

- **Include in Cap Processing –** Enter YES (default) to have this provider record included in the benefit cap processing equation. Change to NO to exclude this provider for this employee from the equation.

DEPENDENTS

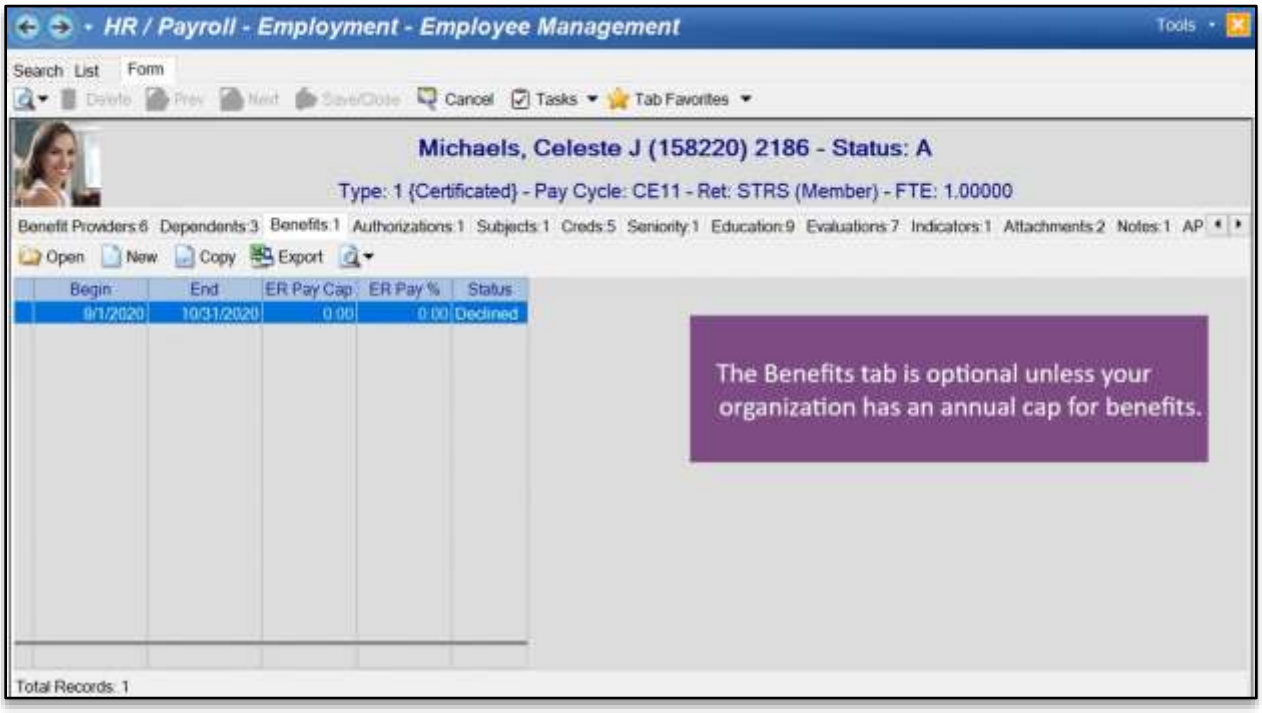
The Dependents tab lists the employee's dependent information.



- **Begin/End Date** – Enter the date range for which the record is applicable. A begin date is required, but the end date may be left blank. (Required)
- **First Name, Preferred First Name, Middle Name, Last Name, Prefix, and Suffix** – Enter the dependent's name. contain any special characters.
- **Gender** – Use the lookup window to select the dependent's gender.
- **Birth Date** – Enter the dependent's birth date. (Required)
- **SSN** – Enter the dependent's social security number
- **Medical** – Enter Yes or No to indicate if this dependent has healthcare through the employee.
- **Relationship** – Use the lookup window to specify the dependent's relationship to the employee. (Required)
- **Status** – This is the status (Active, Inactive) for the dependent.
- **Comment** – Enter any comment about this dependent.

BENEFITS

The Benefits tab contains the basic information for the employee benefit record.



- **Begin/End Date** – Enter the date range for which the record is applicable. A begin date is required, but the end date may be left blank (open ended). (Required)
- **Status** – Use the lookup window to select the status (e.g., Active, COBRA, AB 528, etc.) of the benefits.
- **ER Pay Cap** – Enter an annual dollar amount if there is a cap on total dollars the employer pays for this employee. This will override the employee's bargaining unit setup and cause benefit expenditures in excess of this amount to be deducted from employee's net pay.
- **ER Pay %** – Enter an annual percentage if there is a proration on employee benefits. This will override the employee's computed FTE during a benefit calculation. The percentage only works if the benefit charges are prorated on FTE. The percentage does not take the pay cap into consideration. In other words, if you enter ER Pay Cap and ER Pay %, the ER Pay Cap is ignored.

ADDITIONAL TABS

The learning center is accessible while logged into the system and allows you to access the many training videos and informational articles about Employee Records Tabs. Below is a listing of all 27 tabs available in the Employee Record.



- Employment Tab
- Account Retros Tab
- ACH Tab
- Addons Tab
- AP Payments Tab
- Assets (Employee) Tab
- Assignments Tab
- Attachments Tab
- Authorizations Tab
- Benefit Providers Tab
- Benefits Tab
- Creds Tab
- Deductions Tab/Contributions Tab
- Dependents Tab
- Education Tab
- Evaluations Tab
- Employee Flex Tab
- History Tab
- Indicators Tab
- Leaves Tab
- Notes Tab
- Pay Cycles Tab
- Retirement Tab
- Schedules Tab
- Seniority Tab
- Subjects Tab
- Taxes Tab

While logged into the system, you can follow the link below:

https://caerp-help.frontlineeducation.com/hc/en-us/sections/360009520433-Employee-Record-Tabs