

# Table of Contents

<b>Human Resources</b>	<b>10</b>
Overview.....	11
Human Resources Screens.....	12
HUMAN RESOURCES MODULES.....	13
<b>Data Entry</b>	<b>14</b>
Data-Entry .....	15
Certification Information.....	16
Courses Taken .....	18
Daily Attendance .....	20
Evaluations .....	22
Tenure Information .....	24
Finding an Existing Employee and Editing Tenure Information.....	24
Employee Information.....	26
Employee Information .....	27
Attendance.....	30
Employee Attendance .....	31
Calendar Information .....	33
Personal.....	35
Benefit Information .....	36
Dependents .....	38
Health .....	39
Health Notes.....	40
Emergency Contact.....	41
Retirement Information .....	42
Profession .....	43
Evaluation.....	44
Tenure .....	45
Certification.....	46
Education.....	47
Employee Earnings .....	49
Earnings Information.....	50
Position .....	52
Earnings.....	54
Other Earnings.....	56
Other.....	56
Account .....	58
<b>Maintenance</b>	<b>60</b>
Maintenance .....	61
Employee Types.....	62
Employee Type Workday Calendar.....	65
Employee Type Attendance Detail .....	66
Employee Type Health .....	67
Employee Type Salary Schedule .....	69
Attendance Codes .....	71
Benefit Codes.....	73
Evaluation Types.....	75
Civil Service Codes .....	77
Certification Types.....	79
Cobra Types Maintenance .....	81

Adding a Cobra Type Code.....	81
Finding an Existing Cobra Type Code .....	81
Editing a Cobra Type Code.....	82
Deleting a Cobra Type Code.....	82
Exiting from Cobra Type Code Maintenance .....	82
Employee Calendar Codes.....	83
Health Event Types .....	85
Position Codes .....	86
Retirement System Codes.....	88
Tenure Area Types.....	90
Bargain Units .....	92
Field.....	92
Description.....	92
Adding a Bargain Unit Record .....	92
Finding a Bargain Unit Record .....	93
Editing a Bargain Unit Record .....	93
Deleting a Bargain Unit Record .....	93
Exiting from Bargain Unit Maintenance .....	94
Employee Notes .....	95
Payroll Maintenance .....	96
Payroll Maintenance.....	97
Departments.....	98
Buildings.....	100
Chart of Accounts.....	102
Deduction Codes.....	104
Pay Frequencies .....	106
Earning Codes .....	108
Direct Deposit Banks.....	110
Tax Tables .....	112

## **Reports     116**

Output Reports .....	117
Custom Report Menu .....	119
Position Report Menu .....	120
Attendance Reports.....	121
Attendance Reports .....	122
Accumulated Sick Leave Notice.....	123
Attendance Analysis Reports .....	124
Attendance Detail Reports .....	125
Attendance Worksheet.....	126
Compensated Absence Listing .....	127
Daily Attendance Report .....	128
Employee Attendance Report.....	129
Employees with Negative Balances .....	130
Employee Type Calendar Report.....	131
Monthly Attendance Report.....	132
On Leave Status Report.....	133
Perfect Attendance Report.....	134
Time Summary Listing .....	135
Substitute Listing .....	136
Benefit Reports.....	137
Benefit Reports .....	138
Benefit Census Report .....	139
Benefit Listing.....	140
Employee Benefit Status.....	141
Employee Benefit Waived .....	142

Expanded Benefit Profile.....	143
Civil Service Menu.....	144
Civil Service Menu .....	145
Civil Service Report.....	146
Civil Service Payroll Journal.....	147
Educational Information.....	148
Educational Information .....	149
Approved Courses .....	150
Employee Educational Listing.....	151
Employee Lists .....	152
Employee Lists.....	153
Birthday Listing.....	154
Date of Birth Reports.....	155
Certification List.....	156
Employee Directory.....	157
EEOC Report .....	158
Mailing Labels .....	159
Mortality Report.....	160
Name Change .....	161
Name Listings .....	162
Personnel Files .....	163
R.I.F. Report.....	164
Seniority Report .....	165
Tenure Listing .....	166
Evaluation Reports .....	167
Completed Evaluations .....	168
Individual Employee Evaluation Listing.....	169
Pending Evaluations .....	170
Evaluation Schedule .....	171
Health Reports.....	172
Employee Disabilities.....	173
Employee Health Events Due .....	174
Employee Type Requirements.....	175
Year-End Report Menu.....	176
Year End Report Menu .....	177
Attendance Confirmation Letters.....	178
Year-End Salary and Contract Letters.....	179
Year End Salary & Contracts .....	180
Clear All Contract Salary Information.....	181
Generate Contract Salary Information .....	182
Print Information Summary Listings .....	183
Modify Contract Salary Information.....	184
Printing Contract Letters .....	185
Move Information to Employee Information .....	186
<b>Utilities      187</b>	
Utilities .....	188
Attendance Accrual Utility.....	189
Delete Attendance Utility .....	190
Fiscal Year Attendance Balance Roll-Over .....	191
Health Event Requirement .....	192
Payment Method .....	193
Assignment Method.....	195
Cobra Utility .....	196
Re-Calculate Attendance Taken Amounts .....	197
Record Global Attendance .....	198

Global Benefit Utility .....199  
Custom Utility Menu .....201

<b>Employee Information</b>	<b>202</b>
<b>Calendar Information</b>	<b>203</b>
<b>Attendance</b>	<b>204</b>
<b>Benefit Information</b>	<b>205</b>
<b>Dependents</b>	<b>206</b>
<b>Retirement Information</b>	<b>207</b>
<b>Health</b>	<b>208</b>
<b>Health Notes</b>	<b>209</b>
<b>Emergency Contact</b>	<b>210</b>
<b>Evaluation</b>	<b>211</b>
<b>Education</b>	<b>212</b>
<b>Tenure</b>	<b>213</b>
<b>Certification</b>	<b>214</b>
<b>Tenure Information</b>	<b>215</b>
<b>Certification Information</b>	<b>216</b>
<b>Courses Taken</b>	<b>217</b>
<b>Daily Attendance</b>	<b>218</b>
<b>Evaluations</b>	<b>219</b>
<b>Accumulated Sick Leave Notice</b>	<b>220</b>
<b>Attendance Analysis Reports</b>	<b>221</b>
<b>Attendance Detail Report by Employee Type</b>	<b>222</b>
<b>Attendance Detail Report by Attendance Code</b>	<b>223</b>
<b>Attendance Detail Report by Date</b>	<b>224</b>
<b>Attendance Detail Report by Name</b>	<b>225</b>
<b>Attendance Worksheet</b>	<b>226</b>
<b>Compensated Absence Listing</b>	<b>227</b>
<b>Daily Attendance Report</b>	<b>228</b>

<b>Employee Attendance Report</b>	<b>229</b>
<b>Employees with Negative Balances</b>	<b>230</b>
<b>Employee Type Calendar Report</b>	<b>231</b>
<b>Monthly Attendance Report</b>	<b>232</b>
<b>On Leave Status Report</b>	<b>233</b>
<b>Perfect Attendance Report</b>	<b>234</b>
<b>Time Summary Listing</b>	<b>235</b>
<b>Substitute Listing by Name</b>	<b>236</b>
<b>Substitute Listing by Building</b>	<b>237</b>
<b>Substitute Listing by Date</b>	<b>238</b>
<b>Benefit Census Report</b>	<b>239</b>
<b>Benefit Listing</b>	<b>240</b>
<b>Employee Benefit Status</b>	<b>241</b>
<b>Expanded Benefit Profile</b>	<b>242</b>
<b>Civil Service Report</b>	<b>243</b>
<b>Civil Service Payroll Journal</b>	<b>244</b>
<b>Custom report Menu</b>	<b>245</b>
<b>Approved Courses Pending</b>	<b>246</b>
<b>Employee Educational Record</b>	<b>247</b>
<b>Employee Educational Listing</b>	<b>248</b>
<b>Birthday Listing</b>	<b>249</b>
<b>Date of Birth Reports</b>	<b>250</b>
<b>Certification Listing</b>	<b>251</b>
<b>Employee Directory</b>	<b>252</b>
<b>EEOC Report Files Folder</b>	<b>253</b>
<b>EEOC Report Print Folder</b>	<b>254</b>
<b>Mailing Labels</b>	<b>255</b>

<b>Mortality Report</b>	<b>256</b>
<b>Name Change</b>	<b>257</b>
<b>Name Listings</b>	<b>258</b>
<b>Personnel Files</b>	<b>259</b>
<b>R.I.F. Report</b>	<b>260</b>
<b>Seniority Reports</b>	<b>261</b>
<b>Tenure Listing</b>	<b>262</b>
<b>Evaluation Schedule</b>	<b>263</b>
<b>Completes Evaluations</b>	<b>264</b>
<b>Pending Evaluations</b>	<b>265</b>
<b>Employee Evaluation Listing</b>	<b>266</b>
<b>Employee Disabilities</b>	<b>267</b>
<b>Employee Health Events Due</b>	<b>268</b>
<b>Employee Type Requirements</b>	<b>269</b>
<b>Position Report</b>	<b>270</b>
<b>Clear All Contract Salary Information</b>	<b>271</b>
<b>Generate Contract Salary Information</b>	<b>272</b>
<b>Print Information Summary Listings</b>	<b>273</b>
<b>Modify Contract Salary Information</b>	<b>274</b>
<b>Printing Contract Letters</b>	<b>275</b>
<b>Move Information to Employee Information</b>	<b>276</b>
<b>Attendance Confirmation Letters</b>	<b>277</b>
<b>Employee Types</b>	<b>278</b>
<b>Attendance Days</b>	<b>279</b>
<b>Workday Calendar</b>	<b>280</b>
<b>Attendance Detail</b>	<b>281</b>
<b>Employee Type Health</b>	<b>282</b>

<b>Salary Schedule</b>	<b>283</b>
<b>Attendance Codes</b>	<b>284</b>
<b>Benefit Codes</b>	<b>285</b>
<b>Evaluation Types</b>	<b>286</b>
<b>Civil Service Codes</b>	<b>287</b>
<b>Certification Types</b>	<b>288</b>
<b>Employee Calendar Codes</b>	<b>289</b>
<b>Health Event Types</b>	<b>290</b>
<b>Position Codes</b>	<b>291</b>
<b>Departments</b>	<b>292</b>
<b>Buildings</b>	<b>293</b>
<b>Accounts</b>	<b>294</b>
<b>Deduction Codes</b>	<b>295</b>
<b>Pay Frequencies</b>	<b>296</b>
<b>Earning Codes</b>	<b>297</b>
<b>Direct Deposit Banks</b>	<b>298</b>
<b>Retirement System Codes</b>	<b>299</b>
<b>Tenure Area Types</b>	<b>300</b>
<b>Attendance Accrual</b>	<b>301</b>
<b>Delete Attendance Utility</b>	<b>302</b>
<b>Attendance Balance Roll-Over</b>	<b>303</b>
<b>Health Event Requirement</b>	<b>304</b>
<b>Payment Method</b>	<b>305</b>
<b>Re-Calculate Attendance Taken Amounts</b>	<b>306</b>
<b>Record Global Attendance</b>	<b>307</b>
<b>Custom Utilities</b>	<b>308</b>
<b>Assignment Method</b>	<b>309</b>



<b>Cobra Utility</b>	<b>310</b>
<b>Appointment</b>	<b>311</b>
<b>Position 312</b>	
<b>Earnings 313</b>	
<b>Other Earnings</b>	<b>314</b>
<b>Account 315</b>	
<b>Employee's Benefit's Waived</b>	<b>316</b>
<b>Global Benefit Utility</b>	<b>317</b>
<b>Bargin Unit Maintenance</b>	<b>318</b>

# Human Resources

# Overview

**HUMAN RESOURCES** is a user-friendly, personnel management package that maintains detailed employment records, attendance records, benefits packages, tenure status and emergency information. This module also has the ability to interface directly with the **PAYROLL MANAGER** and **NEGOTIATION MANAGER** modules of the **FINANCE MANAGER SERIES**. It has been developed to deal with the special human resource administration issues that face municipal entities in New York State.

**HUMAN RESOURCES** features a computerized employee database which catalogs all relevant employee data. The database allows users to maintain the data on-hand electronically, eliminating the need to manually research employee data.

**HUMAN RESOURCES MANAGER** features a drop-down menu, offering users a choice of eleven unique employee information screens to maintain its database of employee information. Users can maintain full employee records with the ability to classify their employees into a series of categories, such as employee type, building or department. A variety of reports can then be generated from the employee database.

In addition to the accurate record keeping function, **HUMAN RESOURCES MANAGER** can be used to account for attendance records and additional employment qualifications, such as educational credits earned. These records automatically update the employee's information records to reflect any modifications.

# Human Resources Screens

Before becoming involved in the details of **HUMAN RESOURCES**, the user must grasp the most important concept of the program:

- Maneuvering through the employee information screens

**HUMAN RESOURCES** maintains the complete employee file on six separate choices on the Data-Entry drop-down menu. Each screen contains different employee information. User access to the various screens can be limited depending upon the user's duties.

Certification Information – This screen lists the certification types of all employees

Courses Taken – This screen lists the courses, institutions, grades achieved and credits earned by employees

Daily Attendance – This screen lists the attendance records of all employees for the selected year

Employee Information - This screen lists detailed employee information including:

- Information – basic employee personnel information, such as name, address, employee type, and emergency contact
- Attendance – employee's attendance records, Calendar – employee's attendance summary
- Personal – employee's benefits, health and retirement information
- Evaluations – employee's last evaluation and allows for review of all prior evaluations
- Educational – employee's courses taken to date and their application to the next salary step

Evaluations – This screen lists the evaluation records of all employees

Tenure Information – This screen lists the tenure records of all employees

Users may select an employee to view on each screen by clicking once on the employee's name or by selecting the Emp # radio button in the Sort box and entering the employee's number. This will automatically display the employee's information in a box on the right side of the screen.

# HUMAN RESOURCES MODULES

The **HUMAN RESOURCES** program can be broken up into four different sections or modules. Each module has its own specific purpose in the program. The four modules consist of routines for:

- Data-Entry** All employee information and data used in **HUMAN RESOURCES** is input by selecting Data-Entry on the menu bar. This allows the user to access the drop-down menu and select one of the six options for viewing or editing employee data. It also allows for the entering of tenure and certification information, daily attendance records, employee educational records, employee evaluation data and courses taken.
- Maintenance** The various codes for the classification of employees and their related payroll expenses can be defined by selecting Maintenance from the menu bar. The user can create, edit, delete specific codes, such as employee codes, attendance codes, departments, buildings, the chart of accounts used in **ACCOUNTING MANAGER**, evaluation types, deduction codes, earning codes, and pay frequencies. All classification codes input in **HUMAN RESOURCES** are directly imported into **PAYROLL MANAGER**.
- Reports** By selecting Reports on the menu bar, the user is provided with a variety of standard reports, which may be displayed on the screen, saved as a text file, or printed. Users may create employee listings sorted by employee name, employee number, building location or department. Other possible reports include employee seniority listings, and complete employee personnel files. The report module can also generate daily and specific employee attendance reports, benefit reports, education reports, and evaluation reports.
- Utilities** The user is able to perform general utilities on personnel data by selecting Utilities from the menu bar. The utilities drop-down menu includes options to generate attendance accrual entries and attendance taken entries, re-calculate attendance balances, and roll-over attendance fiscal year balances.

## Data Entry

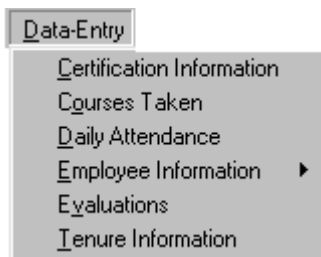
# Data-Entry

The data entry section provides the user with the ability to create, edit, and define individual employee files. The complete employee file is maintained on six distinct sections. User access to the different screens can be limited depending upon the user's privileges.

- Click on Data-Entry on the **HUMAN RESOURCES** menu bar to view the drop-down menu displaying the six sections.

## The drop-down menu

There are six options on the drop-down menu: Certification Information, Courses Taken, Daily Attendance, Employee Information, Evaluations and Tenure Information. Users can select the desired option by clicking once on the desired section.



# Certification Information

The path to the Certification screen is Data Entry → Certification Information. This section details the certification status of employees. **HUMAN RESOURCES** maintains these records and incorporates them into all related information requests. The left side of the screen displays the employees and their certification types. The right side displays the details for the employee record selected on the list. For a screen image please click Certification Information.

- Select Certification Information. The available employees will be displayed in employee name order.

## Adding Certification Information

- Click the ADD button.
- Enter the employee number and press TAB. Click the magnifying glass button to view available employee numbers. Select a number and click OK.
- Enter the certification code and press TAB. Click the magnifying glass button to view available certification codes. Select a code and click OK.
- Enter the date of certification and press TAB.
- Enter the expiration date (optional) and press TAB.
- Enter the state certification number and press TAB.
- Click the radio button to select if the employee's Certification is permanent or must be removed.
- If the employee has position codes, enter the code and press TAB. Click the magnifying glass button to display a list of position codes. Select a code and click OK.
- Click SAVE to lock in the new information.

## Finding an Existing Employee and Editing Certification Information

In order to edit/change or remove an employee's information, it is necessary to locate the employee. Human Resources allows the user to locate an employee's records using the Sort box. The records can be sorted by:

**Emp #**    Activate the EMP # radio button and type in the employee number(s) being searched

**Type**    Activate the TYPE radio button and type in the certification code being searched

## Editing a certification entry

- Click on the desired employee from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.



### **Deleting a certification entry**

- Click on the desired employee from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

### **Exiting from Certification Information**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

# Courses Taken

The path to Courses Taken is Data Entry → Courses Taken. This section details the educational courses taken by employees to increase their standing in their bargaining unit's salary schedule. Human Resources maintains records of these educational courses and incorporates them into the employee's information files. The left side of the screen displays a list of employees. The right side displays the details for the employee selected on the list. For a screen image please click Courses Taken.

- Select Courses Taken. The available employees will be listed in employee name order.

## Adding Course Information

- Click the ADD button.
- Enter the employee number and press TAB. Click the magnifying glass button to view available employee numbers. Select a number and click OK.
- Enter a description of the course taken and press TAB.
- Enter the name of the provider of the course (i.e. college or organization name) and press TAB.
- Enter the date that the coursework was completed and eligible for inclusion in the employee records (i.e. date of final grades/release of results) and press TAB.
- Enter the number of credits and press TAB.
- Select the type of course taken type "I" for Inservice or "G" for Graduate.
- Enter the grade the employee received in the course and press TAB.
- If the course will apply to the employee's next level, click the YES radio button and press TAB.
- Enter the salary level for which the credits were earned or click the magnifying glass to select form a list of available levels and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Employee and Editing Course Information

In order to edit/change or remove an employee's information, it is necessary to locate the employee. Human Resources allows the user to locate an employee's records using the Sort box. The records can be sorted by:

**Emp #**                      Activate the EMP # radio button and type in the employee number(s) being searched.

**School**                     Activate the SCHOOL radio button and type in the institution being searched.

## Editing a course entry

- Click on the desired employee from the list.

- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

#### **Deleting a course entry**

- Click on the desired employee from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

#### **Exiting from Courses Taken**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Daily Attendance

The path to the Daily Attendance screen is Data Entry → Daily Attendance. This section provides for the maintenance of employee attendance records in conjunction with the employee data files. These employee attendance records are automatically linked to the individual employee files. They can account for all types of employee absences, from sick or personal days to vacation days. The left side of the screen displays a list of employees and a box where the user can select specific dates to view. The right side displays the details for the employee record selected on the list. For a screen image please click Daily Attendance.

- Select Daily Attendance. The available employees will be displayed in employee name order.

## Adding an Attendance Record

- Click the ADD button. The current date is automatically entered.
- Enter the date of the attendance record (i.e. date of absence) and press TAB. **HUMAN RESOURCES** will warn the user if this may be a duplicate entry for the employee for the entered date.
- Enter the employee number and press TAB. Click the magnifying glass button to view available employee numbers. Select a number and click OK.
- Enter the appropriate number of units for the absence and press TAB.
- Enter the appropriate attendance code and press TAB. To view a list of available attendance codes, click the magnifying glass button. Select a code and click OK.
- Select the type of attendance record "E" for Earned Accrual, "P" for Prior Balance or "T" for Unit Taken and press TAB.
- Enter the reason for the absence, if any, and press TAB.
- Enter the employee number of the substitute who covered for the employee and press TAB. To view a list of available substitutes, click the magnifying glass. Select a substitute and click OK.
- Click SAVE to lock in the new information.

## Transferring Units Between Codes

The Attendance transfer utility enables data to be reclassified from one code to another while leaving a full audit trail.

- Click the TRANSFER button. The Attendance Transfer screen appears with the current date entered automatically.
- Enter the effective date and press TAB.
- Enter the new code and press TAB. Click the magnifying glass button to view the codes. Select a code and click OK.
- Select the type of attendance record "E" for Earned Accrual, "P" for Prior Balance or "T" for Unit Taken and press TAB.
- Enter the reason, if any and press TAB.
- Enter the appropriate number of units to transfer and press TAB.
- Click SAVE to lock in the information.

### **Finding an Existing Employee and Editing Attendance Information**

In order to edit/change or remove an employee's information, it is necessary to locate the employee. Human Resources allows the user to locate an employee's records by selecting the Fiscal date range.

- Select a specific date range radio button or select the ALL radio button to view all records.

### **Editing an attendance entry**

- Click on the desired employee from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.
- Click SAVE to lock in the changes.

### **Deleting an attendance entry**

- Click on the desired employee from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

### **Exiting from Daily Attendance**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Evaluations

The path to the Evaluations screen is Data Entry → Evaluations. This section provides for the recording of employee evaluation records. The evaluation records are linked to the individual employee files. This data can be used to track past and plan future evaluations. The left side of the screen displays a list of the employees. The right screen displays the details for the employee selected on the list. For a screen image please click Evaluations.

- Select Evaluations. The available employees will be displayed in employee name order.

## Adding Evaluation Information

- Click the ADD button. The current date is automatically entered.
- Enter the date of the evaluation and press TAB.
- Enter the employee number and press TAB. Click the magnifying glass button to view a list of employee numbers. Select a number and click OK.
- Enter the evaluation type and press TAB. Click the magnifying glass button to view a list of evaluation types. Select a type and click OK.
- Enter the employee number of the evaluator, if applicable, and press TAB. To view a list of evaluators, click the magnifying glass button. Select an evaluator and click OK.
- Enter the next evaluation date and press TAB.
- Enter the next evaluation type and press TAB. Click the magnifying glass button to view a list of evaluation types. Select a type and click OK.
- Enter any notes about the evaluation and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Employee and Editing Evaluation Information

In order to edit/change or remove an employee's information, it is necessary to locate the employee. Human Resources allows the user to locate an employee's records using the Sort box. The records can be sorted by:

**Emp #**                      Activate the EMP # radio button and type in the employee number(s) being searched.

**Type**                        Activate the TYPE radio button and type in the evaluation type being searched.

## Editing an evaluation entry

- Click on the desired employee from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically

replace the old data with the new.

- Click SAVE to lock in the changes.

#### **Deleting an evaluation entry**

- Click on the desired employee from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

#### **To exit from Evaluations**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Tenure Information

The path to the Tenure Information screen is Data Entry→Tenure Information. This section details the tenure status of employees. **HUMAN RESOURCES** maintains these records and incorporates them into all related information requests. The left side of the screen displays a list of employees. The right side displays the details for the employee selected on the list. For a screen image please click Tenure Information.

- Select Tenure Information. The available employees will be displayed in employee name order.

## Adding Tenure Information

- Click the ADD button.
- Enter the employee number and press TAB. Click the magnifying glass button to view available employee numbers. Select a number and click OK.
- Enter the tenure type and press TAB. Click the magnifying glass button to view available tenure types. Select a type and click OK.
- Enter the effective date of tenure and press TAB.
- Enter the start of probation date and press TAB.
- Enter the end of probation date and press TAB.
- Enter the Board of Education appointment date, if applicable and press TAB.
- If the employee has position codes, enter the code and press TAB. Click the magnifying glass to display a list of position codes. Select a code and click OK.
- Click SAVE to lock in the new information.

## Finding an Existing Employee and Editing Tenure Information...

In order to edit/change or remove an employee's information, it is necessary to locate the employee. **HUMAN RESOURCES** allows the user to locate an employee's records using the Sort box. The records can be sorted by:

<b>Emp #</b>	Activate the EMP # radio button and type in the employee number(s) being searched
<b>Type</b>	Activate the TYPE radio button and type in a tenure type being searched

## Editing a tenure entry

- Click on the desired employee from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.



- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### **Deleting a Tenure entry**

- Click on the desired employee from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

### **Exiting from Tenure Information**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Employee Information

## Employee Information

This section contains all of the information about a selected employee, including demographic information, attendance, earnings, benefits, health, evaluations, education, inservice and positions information on separate tabs.

- Select Data Entry → Employee Information from the **HUMAN RESOURCES** main menu. For a screen image please click Employee Information.

### Adding an Employee

- Select Data Entry → Employee Information. Select the Information tab from the folder to display the information on the screen.
- Click the ADD button. Human Resources will display a blank Information Screen. An employee number will be automatically assigned by Human Resources to the new employee.
- Enter the employee's name (last name, first name initial) and press TAB.

### **Human Resources Tips:**

**0 Human Resources uses only one field to record the employee name. Entering employee's names in a last name, comma, space, first name, space, middle initial format allows for proper reporting of employee names in alphabetical order.**

- Enter the employee's social security number and press TAB.
- Enter the employee's gender and press TAB.
- Enter a Salutation (e.g. Dr., Mr., Ms., and Mrs.) or select from the drop down list and press TAB.
- Enter the employee's full address, phone number, extension and private phone number. Press TAB after each line.
- Enter the birth date and press TAB.
- Enter the employee's marital status and press TAB.
- Enter the employee's status, "A" for active employees, "I" for inactive employees, "R" for Retired, "L" for on Leave, or "T" for Temporary or select from the drop down list and press TAB.
- Enter in the employee's date of hire and press TAB.
- Enter the reason for termination or select from the drop down list and press TAB.
- Enter the employee's termination date, if a break in service has occurred and press TAB.
- Enter the employee's rehire date and press TAB.

- Enter the employee type for this employee or click the magnifying glass to select from a list of available employee types and press TAB.
- Enter the building code that the will be working in or click the magnifying glass to select from a list of available codes.
- Enter the department code for the employee or click the magnifying glass to select from a list of available codes.
- Enter the employee's ethnicity or select from the drop down list by clicking on the down arrow. Click the desired type and press TAB.
- When all desired information has been entered, click the SAVE button to save the information.

### **Human Resources Tips:**

**0** Every employee must be assigned to an employee type. Employee types allow for the classification of all similar employees into a single group. Employee types allow the user to change certain basic defaults, such as number of sick days and number of payroll checks, for the entire employee type population.

- Human Resources will display a message “Employee and All Associated Records have been Created!”

### **Finding an Existing Employee and Adding Information**

In order to edit/change or remove an employee's information, it is necessary to locate the employee. Human Resources allows the user to locate files using the SORT feature and four search options:

- Select Data-Entry → Employee Information from the drop-down menu.
- Select the Employee tab from the folder.

<b>Name</b>	Activate the NAME radio button (in the Sort box) and type in the first few characters of the employee's name.
<b>Number</b>	Activate the NUMBER radio button (in the Sort box) and type in the number.
<b>SSN</b>	Activate the SOCIAL SECURITY NUMBER radio button (in the Sort box) and type in the employee's number.
<b>Status</b>	Activate one of the STATUS radio buttons, to narrow down the search.

### **Editing an employee entry**

- Select the employee from the Employee tab.
- Click the UPDATE button.

- Press TAB until the desired information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

#### **Removing an Employee entry**

- Select the employee to be removed from the Employee tab.
- Click the Demographics tab to display the employee information.
- Click DELETE to remove the employee.
- **HUMAN RESOURCES** will ask, "Delete this employee?" Click "Yes" to remove the entry or click "No" to keep it.

#### **Exiting from Information**

- Click the EXIT button to return to the Human Resources Main Menu.

## Attendance

## Employee Attendance

This section allows the user to view the employee's entire list of attendance entries. The user can also enter and edit attendance events on this screen. The left side of the screen displays a list of all attendance entries beginning with the most recent. The right side displays the details for the event selected on the list. For a screen image please click Attendance.

- Locate the desired employee from the Employee tab.
- Click the Attendance tab.

### Adding an Attendance entry

- Click the ADD button. The current date is automatically entered.
- Enter the date and number of units and press TAB after each.
- Enter the attendance code and press TAB. Click the magnifying glass to view available codes. Select the code and click EXIT.
- Select the type from the drop down list and press TAB.
- Enter the reason for the absence, if any and press TAB.
- Enter a substitute covering the absent employee, if any and press TAB. Click the magnifying glass to view available substitutes. Select substitute and click EXIT.
- Click SAVE to save the new information.

### Editing an Attendance entry

- Click the date desired from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### Deleting an Attendance entry

- Click the date desired from the list
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.





## Calendar Information

The calendar summarizes the employee's attendance records by month. The left side of the screen displays a calendar for the user to select a desired attendance date. The calendar will default to the current month. Other months may be selected to enter or delete information. The right side displays a summary of the employee's prior, annual, taken, and available days. For a screen image please click Calendar Information.

- Locate the desired employee from the Employee tab.
- Click the Attendance tab and then the Calendar button.

### Viewing Attendance Entries by Employee Type

- Enter the Employee type or click the magnifying glass to select from a list of available types, select the type and click the OK button to return to the Calendar screen.
- The attendance information for the employee type selected will appear in the browser located at the bottom of the screen.

### Adding an attendance entry

- Use the arrows on the sides of the displayed month to select the desired month.
- Click in theCalendar text box for the desired day.
- The Absent Maintenance dialog box will appear. The employee's name, number and date selected will be entered automatically.
- Enter the employee type or click the magnifying glass to select from a list of available types, select the desired type and click the OK button to return to the Absence Maintenance screen and press TAB.
- Enter the building code or click the magnifying glass to select from a list of available codes and press TAB.
- Enter the number of units and press TAB.
- Enter the attendance code or click the magnifying glass to view available codes and press TAB.

### **Human Resources Tips:**

**0** There are five fixed attendance codes, \*S, \*P, \*V, \*C, and LV. The \* codes are accrual codes used to grant employees units earned. The LV code is used to record extended periods of unpaid leave. Any recorded leave is used in the calculation of seniority dates.

- Select the type by clicking the down arrow and the desired type and press TAB.
- Enter the reason for the absence, if any and press TAB.

- If the type is Unit Taken enter a substitute covering the absent employee, if any and press TAB. Click the magnifying glass to view available substitutes. Select the substitute and click EXIT.
- Click OK to return to the Calendar.

Human Resources will update the employee's attendance balances after all entries have been made in the calendar.

#### **Editing the calendar**

- Click the date desired from the calendar.
- Enter the new information in the Absent Maintenance dialog box.
- Click OK to lock in the changes.

#### **Exiting Calendar**

- Click the Attendance button to return to the Attendance screen.

Personal

## Benefit Information

The path to the Benefit Information screen is Data Entry → Employee Information → Personal folder.

This section details the employee's benefit and dependent information. The top of the screen displays a list of all the employee's insurance providers. The bottom displays the details for the provider selected on the list. For a screen image please click Benefit Information.

- Locate the desired employee from the Employee tab.
- Click the Personal tab then the Benefits button.

### Adding a benefit code

- Click the ADD button.
- Enter the provider name or click the magnifying glass to view available insurance providers and press TAB.
- Enter the Start and End date and press TAB after each.
- Select the coverage type "I" for Individual, "F" for Family, or "S" for Spousal or select from the drop down list and press TAB.
- Enter the Employee portion amount and press TAB. The amount paid is the amount of money contributed by the employee towards the insurance coverage.
- Enter the Employer Cost and press TAB. The employer cost is the amount contributed by the employer toward the insurance coverage.
- If the type of insurance selected is Life Insurance then the user must enter the face value. The face value option is only available if the insurance type is Life Insurance.
- The Total Cost amount will be filled in automatically, but can be changed by the user if necessary. The total cost is the combined amount of the employee portion and the employer cost.
- Enter the waiver date, if any, and press TAB.
- Click SAVE to lock in the new information.

### Editing a benefit code

- Click the provider desired from the list.
- Click the UPDATE button from the Update Panel.
- Press Tab until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.
- Click SAVE to lock in the changes.

### Delete a benefit code

- Click the provider desired from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this benefit record?"
- Click YES to delete the record.
- Click NO to keep the record.

### **Exiting from Benefits**

- Click the EXIT button to return to the Human Resources Main Menu.

## Dependents

This section details the employee's dependents and their insurance coverage information. For a screen image please click Dependents.

### Adding a Dependent

- Enter the Start and End date and press TAB.
- Select the Relationship from the drop down list and press TAB.
- Enter the name of the dependent and press TAB.
- Enter the date of birth and press TAB.
- Enter the social security number, if applicable, and press TAB.
- Click SAVE to lock in the new information.

### Editing the Dependent's information

- Select the dependent from the listing.
- Click the UPDATE button from the update panel.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### Deleting a Dependent's information

- Select the dependent from the listing.
- Click the DELETE button from the update panel.
- **HUMAN RESOURCES** will ask you "Delete this dependent?"
- Click "YES" to remove the dependent or click "NO" to keep it.

## Health

The path to the Health Information screen is Data Entry → Employee Information → Personal folder.

- Click the Health button to display the health information screen.

The top part of the screen displays a listing of the employee's health event activities. The bottom of the screen displays the detailed information for the health event selected. For a screen image please click Health.

### Editing a Health Event

- Select the Health Event from the list.
- Click the UPDATE button from the Update Panel.
- Enter in the Last Date the event occurred.
- Enter in the Date for the event to occur next.
- Click SAVE to lock in the changes.

## **Health Notes**

The Health Notes button is used to display and enter employee disability information. For a screen image please click Health Notes.

### **Adding a Health Note**

- Click the HEALTH NOTES button from the Personal folder.
- Click the ADD button
- Enter the disability
- Enter the date that the disability occurred.
- Enter YES or NO if the disability is permanent.
- Click the SAVE button to save the new information.

### **Editing a Health Note**

- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the new information and click SAVE to lock in the changes.

### **Deleting a Health Note**

- Select the Health Note from the listing.
- Click the DELETE button.

### **Exiting from the Health Notes screen**

- Click the EXIT button to return to the Personal folder.



## **Emergency Contact**

The Emergency Contact screen displays the name, relationship, and phone number of the person to contact in the event of an emergency. For a screen image please click Emergency Contact.

### **Adding Emergency Contact Information**

- Click ADD from the update panel.
- Enter the name of the person to contact and press TAB.
- Enter their relationship to the employee and press TAB.
- Enter the phone number of the contact person.
- Click SAVE to save the new information.

### **Editing the Emergency Contact Information**

- Click the UPDATE button from the Update Panel.
- Press TAB until the information to be change is highlighted.
- Enter the new information
- Click SAVE to lock in the changes.

### **Deleting Emergency Contact Information**

- Select the contact from the listing.
- Click the DELETE button from the update panel.
-

## **Retirement Information**

The path to the Retirement Information is Data Entry → Employee Information → Personal folder.

This section details the employee's inservice information. This includes retirement system and civil service information. For a screen image please click Retirement Information.

- Locate the desired employee from the Employee tab.
- Click the Personal tab and then the Retirement button.

### **Editing an Retirement entry**

- Click the UPDATE button.
- Enter the type of the first retirement system or click the magnifying glass to select from a list of available retirement codes and press TAB.
- Enter the retirement system number, date entered, and retirement tier number, and if in TRS, the months per year and applicable salary, and Press TAB after each.
- Enter the information for the second retirement system, if applicable, in a similar manner as above and press TAB.
- After all retirement information is entered, select "YES" or "NO" if the employee is a veteran.
- Click SAVE to lock in the changes.

### **Exiting from Retirement**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

Profession

## Evaluation

The path to the Evaluation Information screen is Data Entry → Employee Information → Profession folder → Evaluation button. This section details the employee's past evaluations. The left side of the screen displays a list of all evaluations of the employee. The right side displays the details for the evaluation selected on the list. For a screen image please click Evaluation.

- Locate the desired employee from the Employee tab
- Click the Profession tab then the Evaluation button. The last evaluation is automatically displayed on the right.

### Adding an evaluation

- Click the ADD button. The current date is automatically entered.
- Enter the evaluation type and press TAB. To view a list of available evaluation types, click the magnifying glass button. Select the type and click OK.
- Enter the employee number of the evaluator and press TAB. To view a list of available evaluators, click the magnifying glass button. Select the type and click OK.
- Enter the date of the employee's next evaluation and press TAB.
- Enter the evaluation type of the next evaluation. Click the magnifying glass button to view a list of available types. Select the type and click OK.
- Enter any notes about the evaluation.
- Click SAVE to lock in the new information.

### Editing an evaluation

- Click the evaluation desired from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### Deleting an evaluation

- Click the evaluation desired from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this Evaluation?"
- Click YES to delete the evaluation.
- Click NO to keep the evaluation.

### Exiting from Evaluations

- Click the EXIT button to return to the Human Resources Main Menu.

## Tenure

The path to the Tenure Information screen is Data Entry→Employee Information → Profession folder → Tenure button. This section details the tenure status of employees. Human Resources maintains these records and incorporates them into all related information requests. The Top of the screen displays a list of tenure types held by the employee. The bottom displays the details for the tenure type selected on the list. For a screen image please click Tenure.

- Select Tenure button. The available Tenure types will be displayed.

### Adding Tenure Information

- Click the ADD button.
- Enter the tenure type or click the magnifying glass button to view available tenure types. Select a type and click OK and press TAB.
- Enter the effective date of tenure and press TAB.
- Enter the start date of probation and press TAB.
- Enter the end date of probation and press TAB.
- Enter the Board of Education appointment date, if applicable and press TAB.
- If the employee has position codes, enter the code and press TAB. Click the magnifying glass to display a list of position codes. Select a code and click OK.
- Click SAVE to lock in the new information.

### Editing a tenure entry

- Click on the Tenure type from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.
- Click SAVE to lock in the changes.

### Deleting a tenure entry

- Click on the desired Tenure type from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

## **Certification**

The path to the Certification screen is Data Entry → Employee Information → Profession folder → Certification button. This section details the certification status of employees. Human Resources maintains these records and incorporates them into all related information requests. The left side of the screen displays the employee's certifications. The right side displays the details for the certification selected on the list. For a screen image please click Certification.

### **Adding Certification Information**

- Click the ADD button.
- Enter the certification type code and press TAB. Click the magnifying glass button to view available certification codes. Select a code and click OK.
- Enter the date of certification and press TAB.
- Enter the expiration date (optional) and press TAB.
- Enter the state certification number and press TAB.
- Click the radio button to select if the employee's Certification is permanent or must be removed.
- If the employee has position codes, enter the code and press TAB. Click the magnifying glass button to display a list of position codes. Select a code and click OK.
- Click SAVE to lock in the new information.

### **Editing a certification entry**

- Click on the desired certification from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### **Deleting a certification entry**

- Click on the desired certification from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete the record.
- Click NO to keep the record.

### **Exiting from Certification Information**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

## Education

The path to the Education Information screen is Data Entry → Employee Information → Profession folder → Education button.

This section details the courses that an employee has taken. The upper left section displays a list of all the courses taken beginning with the most recent. The upper right section displays the details for the course selected on the list. The bottom section displays a summary of the total credits taken and the last course taken by the employee. For a screen image please click Education.

- Locate the desired employee from the Employee tab.
- Click the Profession folder and then the Education button.

### Add a course

- Click the ADD button.
- Enter the course description and press TAB.
- Enter the course provider (i.e. college or organization name) and press TAB.
- Enter the date that the coursework was completed and eligible for inclusion in the employee records (i.e. date of final grades or release of results) and press TAB.
- Enter in the number of credits and press TAB.
- Select the course type "I" for Inservice or "G" for Graduate and press TAB.
- Enter the grade the employee received in the course and press TAB.

### Human Resources Tips:

**0** To track a pending course, enter the course upon approval by the Human Resources department. Upon completion, enter the date completed and course grade. Until a grade and completion date is entered, Human Resources will consider the course as pending.

- If the course will apply to the employee's next step increase enter "y" for yes and press TAB.
- If YES enter the Level or Click the magnifying glass to select from the list of Salary Levels.
- Click SAVE to lock in the new information.

### Editing an education entry

- Click the course desired from the list.
- Click the UPDATE Button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

### Deleting an education entry

- Click the course desired from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this course?"
- Click YES to delete the course.
- Click NO to keep the course.

### **Exiting from Education**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu



# Employee Earnings

## Earnings Information

The Earnings Information screen can be accessed by following the path: Data Entry→ Employee Earnings→ Earnings tab. This screen details the employee’s salary and contract information. For screen image please click Earnings Information.

### Adding an Appointment

An appointment represents a contractual earning, usually supported by the Board of Education.

- Click the Employee tab to select a specific employee from the list by using the scroll bar or the sort feature.
- Click the Earnings tab, and then click the appointment button.
- Click ADD from the update panel.
- Enter the employee type or click the magnifying glass to select from a list of available employee types and press TAB.
- Enter the payment method or click the magnifying glass to select from a list of available payment methods.

“A” – Annualize                      The employee’s salary is based on an hourly or daily rate, which is totaled to a yearly, base contract. Therefore it acts exactly like a “C” only data entry at the assignment level is different. A period pay is determined by dividing the yearly base contract by the number of checks to be received.

“C” – Contractual                      The employee’s salary is based on a yearly total which is used to give a period pay. This amount usually originates from a negotiated salary schedule.

“D” – Daily                              The employee’s salary is dependent on the number of days worked in a payroll cycle.

“H” – Hourly                            The employee’s salary is dependent on the number of hours worked in a payroll cycle.

“S” – Supplemental                      This type allows for extra earnings not directly related to any of the previous types to be added as a flat amount only. An example of this would be payment for chaperoning.

- Enter the over all FTE% and press TAB.

### **Payroll Tips:**

**0            Overall FTE is the Full Time Equivalent Percentage this employee will work. (i.e. If a teacher is expected to teach 5 classes a day and the employee only teaches 3 classes he/she is a 3/5 or 60% FTE.**

- Enter the number of months the employee is expected to work during the year and press TAB.
- Enter the standard hours, recognized by the retirement system for a specific appointment, and press TAB.
- Enter the start and end date, this is the date for which this appointment and its assignments will be valid for within the current fiscal year and press TAB.
- Enter the Board date, this is the date the school board approved this job and press TAB.
- Enter the Increment date, this is the month and day during the fiscal year that the employee should move up a step.
- Enter the retirement System Code or click the magnifying glass to select from a list of available codes.

*Only for Supplemental Earnings:*

- Select the Tax Method, Normal or Flat, this determines the percentages that will be paid out on supplemental earnings.
- Enter the Frequency Code or click the magnifying glass to select from the list of available codes.

**Edit/Change an Appointment**

- Select the employee appointment to update.
- Click the UPDATE button from the update panel.
- Press TAB until the information to be changed is highlighted.
- Enter the correct data and click SAVE. **PAYROLL MANAGER** will automatically replace the old data with the new data.

**Remove an Appointment**

- Select the employee appointment to be removed.
- Click the DELETE button from the update panel.
- **PAYROLL MANAGER** will ask, “Delete this appointment?”
- Click “YES” to delete the appointment or click “NO” to keep the appointment.

## Position

The path to the employee position screen is Data Entry → Employee Earnings → Earnings tab → Position. For screen image please click Position.

### Payroll Tips:

**0 To enter the position the user must first click one of the employee appointments and then click the Position button.**

### Adding a Position

- Click the ADD button from the update panel.
- Enter the position code or click the magnifying glass to select from a list of available codes and press TAB.
- Enter the building code or click the magnifying glass to select from a list of available codes and press TAB.
- Enter the percentage for this position. (i.e. A 3/5 Teacher would be a 60% employee)
- Enter the start and end date for this position and press TAB.
- Enter the department code or click the magnifying glass to select from a list of available codes.
- Enter the Certification code or click the magnifying glass to select from a list of available codes.
- Enter Tenure Code or click the magnifying glass to select from a list of available codes.
- Click SAVE to lock in the new information.

### Editing/Changing a Position

- Select the desired position from the listing.
- Click UPDATE from the update panel.
- Press TAB until the desired information to be changed is highlighted.
- Enter the correct data and click SAVE. **PAYROLL MANAGER** will automatically replace the old data with the new data.

### Remove a Position

- Select the desired Position from the listing.
- Click the DELETE the button from the update panel.
- **PAYROLL MANAGER** will ask you “Delete this position?”
- Click “YES” to remove the position or click “NO” to keep the position.

## Earnings

The path to the Earnings entries is Data Entry → Employee Earnings → Earnings tab → Earnings button. For screen image please click Earnings.

### Adding Contractual Earnings

- The starting and ending fields default to the starting and ending dates for the appointment as defined in Appointment Maintenance. The user can except these dates or enter a new start and end date for the assignment and press TAB.
- The number of checks field defaults to the number of checks as specified for the employee type in the Employee Type Maintenance function. The user can except this amount of checks or enter the new number of checks the employee will receive and press TAB.
- The working days field defaults to the number of working days in the contract as specified for the employee type in the Employee Type Maintenance function. The user can except this amount or enter the new number of working days for this employee and press TAB.
- The hours per day field defaults to the standard number of hours per day as specified for the employee type in the Employee Type Maintenance function. The user can except this amount or enter the new number of hours per day for this employee and press TAB.
- Enter the Salary Step for the assignment and press TAB.
- Enter the Level for this assignment and press TAB.
- Enter the base contract amount and press TAB.
- Enter the FTE amount or accept the system-calculated amount and press TAB. The FTE Amount is equal to the Base Contract Amount multiplied by the Overall FTE %.
- Enter the Daily Rate or accept the system-calculated amount and press TAB. The Daily Rate is equal to the FTE Amount divided by the number of Standard Contract Days defined in the Employee Type Maintenance.
- Enter the Hourly Rate or accept the system-calculated rate and press TAB. The Hourly Rate is equal to the Daily Rate divided by the number of Hrs per Day.
- Enter the Entitlement Amount or accept the system-calculated amount and press TAB. The Entitlement Amount is equal to the Daily Rate multiplied by the number of Working Days.
- Enter the Bi-weekly amount or accept the system-calculated pay period amount and press TAB. The Period Pay amount is equal to the FTE amount divided by the # of Checks to be received.

- Click SAVE to lock in the new information.

### **Payroll Tips:**

**0** After Earnings have been entered, the user must remember to select the account that the funds will be distributed from for this appointment. An error window displays to remind you. If this happens click OK and then click the ACCOUNT button to enter the Employee Earn Codes screen. Enter the information and click SAVE.

### **Editing/Changing a Earning**

- Select the desired Earning from the listing.
- Click UPDATE from the update panel.
- Press TAB until the desired information to be changed is highlighted.
- Enter the correct data and click SAVE. **PAYROLL MANAGER** will automatically replace the old data with the new data.

### **Payroll Tips:**

**0** If you change any \$ amount figure, you must also update the account information under the ACCOUNT button.

### **Removing an Earning**

- Select the desired Earning from the listing.
- Click the DELETE the button from the update panel.
- **PAYROLL MANAGER** will ask you “Delete this Earning?”
- Click “YES” to remove the position or click “NO” to keep the Earning.

## Other Earnings

The path to the Other Earnings button is Data Entry → Employee Earnings → Earnings tab → Other Earnings button. For screen image please click Other Earnings.

### Adding Other Earnings

- Select the Type of Earning from the drop down list, Longevity, Credit Hours, Differential or Other.

#### **Longevity and Differential...**

- Enter the start and end date.
- Enter the number of checks to be paid.
- Enter the number of working days.
- Enter the salary step.
- Enter the salary level.
- Enter the base contract amount.
- Click Save to save the new information.

#### **Credit Hours...**

- All of the entries above.
- Enter the number of credits.
- Enter the appropriate daily rate, if different than the default.

#### **Other...**

- Enter the start and end date.
- Enter the earning code or click the magnifying glass to select from a list of available codes.
- Enter the number of checks to be paid.
- Enter the number of working days.
- Enter the base contract amount.



### Editing/Changing an Other Earning

- Select the desired Earning from the listing.
- Click UPDATE from the update panel.
- Press TAB until the desired information to be changed is highlighted.
- Enter the correct data and click SAVE. **PAYROLL MANAGER** will automatically replace the old data with the new data.

### Removing an Earning

- Select the desired Earning from the listing.
- Click the DELETE the button from the update panel.
- **PAYROLL MANAGER** will ask you “Delete this Earning?”
- Click “YES” to remove the position or click “NO” to keep the Earning.

## Account

The path to the Account button is Data Entry → Employee Earnings → Earnings tab → Account button. For screen image please click Account.

### Adding an Earn Code Account

- Enter the account number or click the magnifying glass to select from a list of available account numbers.
- Enter the percent and press TAB.
- The earn limit and amount per check amounts are automatically filled in.
- Click the SAVE button to save the new information.

### Updating an Earn Code Account

- Select the desired Earning from the listing.
- Click UPDATE from the update panel.
- Press TAB until the desired information to be changed is highlighted.
- Enter the correct data and click SAVE. **PAYROLL MANAGER** will automatically replace the old data with the new data.

### Removing an Earn Code Account

- Select the desired Earning from the listing.
- Click the DELETE the button from the update panel.
- **PAYROLL MANAGER** will ask you “Delete this earnings account record?”
- Click “YES” to remove the position or click “NO” to keep the Earning.



# Maintenance

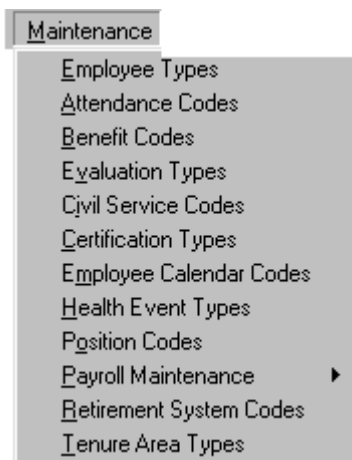
# Maintenance

The maintenance section allows the user to define various codes for the classification of employees, daily attendance records, and related payroll expenses. The user can customize these codes to their special needs.

- Click on Maintenance on the Human Resources menu bar to view the drop-down menu displaying the six sections.

## The drop-down menu

There are twelve options on the drop-down menu: Employee Types, Attendance Codes, Benefit Codes, Evaluation Types, Civil Service Codes, Certification Types, Employee Calendar Codes, Health Event Types, Position Codes, Payroll Maintenance, Retirement System Codes, and Tenure Area Types. Users can select the desired option by clicking once on the desired section.



# Employee Types

Employee types provide the user with the ability to create, edit, and define categories to classify all of its employees. Employees may be classified to simplify reporting purposes and allow for uniform changes in basic payroll assumptions. This section provides the user with a folder with five tabs on it for adding and viewing the employee types, workday calendar, attendance detail, health events and salary schedule.

- Select Employee Types to enter a listing of employee types. A listing of employee types will be displayed in alphabetical order.

## Employee Type

The left side of the screen displays a list of all employee types. The right side displays the details for the type selected on the list. For a screen image please click Employee Types.

## Adding an Employee Type

- Click ADD from the Update Panel.
- Type the employee type code (up to a maximum of five characters) and press TAB.
- Enter the description and press TAB.
- Enter a name of the bargaining unit for this employee type and press TAB.
- If the employee type is instructional type “Y” and press TAB.
- If the employee type is substitute type “Y” and press TAB. This will enable employees to be seen as available substitutes in attendance record data entry (please refer to **PERSONNEL MANAGER**, attendance data entry).
- If the employee type is to be included in the current payroll Generation and Supplemental Earnings, type “I” for “Include” and press TAB.
- Enter the length of the contract year in days and press TAB. This amount should represent the total, regular working days for the entire fiscal year for this employee type.
- Enter the normal hours per day and months per year for the employee type and press TAB.
- Enter in the default number of checks per fiscal year the employee type will be paid in and press TAB.
- Enter the method of biweekly pay calculation, “D” if based upon the Daily Rate or “C” if based upon the number of Checks.
- Click SAVE to lock in the new information.

### Finding an Existing Employee Type

In order to edit/change or remove an employee type, it is necessary to locate it. Human Resources allows the user to locate files using the SORT method with two search options.

**Type**                    Activate the TYPE radio button (in the Sort box) and type in the first characters of the employee type.

**Description**        Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the employee type description.

### Editing an employee type

- Click the desired employee type from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

### Deleting an employee type

- Click the desired employee type from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this employee type?"
- Click YES to delete the type.
- Click NO to keep the type.

### To exit from Employee Types

- Click the EXIT button to return to the **HUMAN RESOURCES** main menu.

### Attendance Days

- Click the Attendance Days button to display a listing of Attendance days for the employee type. For a screen image please click Attendance Days.

### Add Attendance Days

- Click the desired employee type from the list.
- Click the ADD button from the Update Panel.
- Enter the number of Sick Days, Personal Days, Vacation Days and Compensation Days for the Annual amount and Maximum amount based on the employee type.
- Enter the accrual rate if any for each type of day.
- Enter the number of personal days that are convertible to sick days.

- Enter YES or NO to have these Personal days converted to sick days.
- Enter the number of Compensation days that are convertible to sick days.
- Enter YES or NO to have these Compensation days converted to sick days.
- Click SAVE to lock in the new information.

### **Editing the Attendance Days**

- Select the employee type from the list.
- Click the UPDATE button from the Update Panel.
- Press Tab until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.



# Employee Type Workday Calendar

The path to the Employee Type Workday Calendar screen is Maintenance → Employee Type → Workday. **HUMAN RESOURCES** allows the user to enter attendance codes on a workday calendar for the employee type. The left side of the screen displays a calendar where the user can select a month and date. The right side displays a summary of all the codes entered on the calendar. For a screen image please click [Workday Calendar](#).

- Select the desired employee type from the Employee Types tab.
- Click the Workday tab.

## Creating the Workday Calendar

- Select the specific month using the arrow buttons on the sides of the month.
- Click the date desired on the calendar.
- Enter the Non-Working attendance code. To view a list of available codes, double click on the box for the date. Select a code and click OK. Human Resources automatically updates the Calendar summary on the right side of the Workday screen.

# Employee Type Attendance Detail

The path to the Employee Type Attendance Codes screen is Maintenance → Employee Type → Attendance Detail. **HUMAN RESOURCES** provides the user with the ability to enter dates on the calendar in the attendance Detail section. For a screen image please click Attendance Detail.

- Select the desired employee type from the Employee Types tab.
- Click the Attend Detail tab.

## Adding a date to the calendar

- Click the ADD button. The current date is automatically entered.
- Enter the attendance code. To view available codes, click the magnifying glass button. Select a code and click OK.
- Click SAVE to lock in the new information.

## Deleting a date from the calendar

- Select the desired date from the list.
- Click DELETE. **HUMAN RESOURCES** will ask, "Delete this attendance record?"
- Click YES to delete record.
- Click NO to keep record.

## To exit Attend Detail

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Employee Type Health

The path to the Employee Type Health screen is Maintenance → Employee Type → Health. The Health section is used to keep track of various medically related events (e.g. physicals). For a screen image please click Employee Type Health.

- Select the desired employee type from the Employee Types tab.
- Click the Health tab.

## Adding health requirements

- Click the ADD button from the update panel.
- Enter a valid health event or to view available events, click the magnifying glass. Select the event and click OK. Human Resources will automatically add default information and press TAB.
- Answer "YES" if it is required or "NO" if it is not required and press TAB.
- Enter a next due date, if one standard is to be used and press TAB.
- Enter any comments and press TAB.
- Click SAVE to lock in the new information.
- Click YES to update the next due date for all employees of this type or NO to keep the setting.

## Editing health requirements

- Click the desired event from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting health requirements

- Click the desired event from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "This will also delete employee's records about this requirement. Delete this health category record?"
- Click YES to remove the record.
- Click NO to keep the record.

## **Human Resources tips:**

**0** If you delete the Health Event, you will also delete this event from the employee records that have that event.

## To exit from Health

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.



# Employee Type Salary Schedule

The path to the Employee Type Salary Schedule screen is Maintenance → Employee Type → Schedule. Salary schedule information can be set for each employee type. For a screen image please click Salary Schedule.

- Select the desired employee type form the Employee Types tab.
- Click the Schedule tab.

## Adding a Salary Schedule

- Click ADD from the Update Panel to add a new schedule
- Enter the control ID or click the magnifying for a list of available Salary Schedules.
- Enter the effective date for this schedule.
- Enter the Start date.
- Enter the End date.
- Enter the Schedule type.
- Click SAVE to lock in the new schedule.

## Editing/Changing a Salary Schedule

- Click the desired schedule from the list.
- Click the UPDATE button from the update panel.
- Press TAB until the information to be changed is highlighted.
- Enter the new information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Removing a Salary Schedule

- Select the individual salary schedule from the listing.
- Click DELETE on the Update Panel.
- **HUMAN RESOURCES** will ask you “Delete this record?”
- Click “Yes” to remove the schedule.
- Click “No” to keep the schedule.

### **Exiting the Salary Schedule Module**

Selecting EXIT will return the user to the **PAYROLL MANAGER** Main Menu.

# Attendance Codes

The path to the Attendance Codes screen is Maintenance → Attendance Codes. Attendance Codes are used by Human Resources to categorize employee attendance records. Codes are used to maintain employee sick and vacation time records. For a screen image please click Attendance Codes.

- Select Attendance Codes. A listing of attendance codes will be displayed in alphabetical order.

## Adding a Code

- Click ADD on the Update Panel.
- Type the attendance code (up to a maximum of two characters) and press TAB.
- Enter the description and press TAB.
- If the absence is chargeable type “Y” for “YES” and press TAB.
- Enter the type the absence is chargeable against, “S” for sick, “V” for vacation, “P” for personal or “C” for comp time and press TAB
- Select unit type, Hourly or Daily.
- Enter “Y” or “N” if it applies to Seniority Calculation.
- Click SAVE to lock in the new attendance code.

## **Personnel Tips:**

**0** There are five fixed attendance codes, \*S, \*P, \*V, \*C, and LV. The \* codes are accrual codes used to grant employees units earned. The LV code is used to record extended period of unpaid leave. Any recorded leave is used in the calculation of seniority dates.

## Finding an Attendance Code

In order to edit/change or remove an attendance code, it is necessary to locate it. The SORT method assists the user in locating the attendance code.

**CODE** Allows the user to sort by the attendance code being searched.

**DESCRIPTION** Allows the user to sort by code description.

### **Editing/Changing an Attendance Code**

**HUMAN RESOURCES** provides the user with the ability to edit and change attendance codes.

- Select the attendance code from the listing.
- Select UPDATE from the Update Panel.
- Press TAB until the information to be changed is highlighted.
- Enter in the correct data and click SAVE. **HUMAN RESOURCES** will automatically replace the old data.

### **Removing an Attendance Code**

- Select the individual attendance code from the listing.
- Select DELETE from the Update Panel.
- **HUMAN RESOURCES** will ask you "Delete this attendance code?"
- Click "Yes" to remove the code.
- Click "No" to keep the code.

### **Exiting the Attendance Code Module**

- Click the EXIT button to return to the **HUMAN RESOURCES** main menu.



# Benefit Codes

The path to the Benefit Codes screen is Maintenance → Benefit Codes. The benefit code listing provides the user with the ability to create, edit, and define benefit codes to maintain benefit information for employees. For a screen image please click Benefit Codes.

- Select Benefit Codes. A listing will be displayed by Provider and Type.

## Adding a Benefit Code

- Click the ADD button.
- Select the benefit type from the drop down list and press TAB.
- Enter the provider name and press TAB.
- Enter the policy number, if necessary, and press TAB.
- Select the deduction code for this coverage type, if any and press TAB. Click the magnifying glass button to view available deduction codes. Select a code and click OK.
- Enter the default coverage total cost, allocation type (% or \$), employer cost, and employee costs and press TAB after each.
- Repeat for each desired coverage type.
- Click SAVE to lock in the new information.

## Personnel Tips:

**0** If an employee wishes to have any of their benefits **WAIVED**, for each type of benefit code the user must enter a new code and enter **WAIVED** as the provider.

## Finding an Existing Benefit Code

In order to edit/change or remove a benefit code, it is necessary to locate the code. **HUMAN RESOURCES** allows the user to locate files by benefit type.

<b>HEALTH</b>	Sorts the listing by having it display only the health insurance type in the listing
<b>DENTAL</b>	Sorts the listing by having it display only the dental insurance type in the listing
<b>LIFE</b>	Sorts the listing by having it display only the life insurance type in the listing
<b>DISABILITY</b>	Sorts the listing by having it display only the disability insurance in the listing
<b>MAJOR MEDICAL</b>	Sorts the listing by having it display only the major medical insurance in the listing

**OTHER** Sorts the listing by having it display only the insurance other than the ones previously displayed

**ALL** Displays all types in the listing

- Select a radio button (in the Type box) to sort benefit codes by benefit type or click ALL to view all benefit types.

#### **Editing a benefit code**

- Click the desired benefit code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

#### **Deleting a benefit code**

- Click the desired benefit code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this insurance record?"
- Click YES to delete the record.
- Click NO to keep the record.

#### **Exiting from Benefit Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Evaluation Types

The path to the Evaluation Types screen is Maintenance → Evaluation Types. The evaluation types listing provides the user with the ability to create, edit, and define evaluation types to categorize each different type of evaluation. For a screen image please click Evaluation Types.

- Select Evaluation Types. A listing of evaluation types will be displayed in alpha-numerical order.

## Adding an Evaluation Type

- Click the ADD button.
- Enter the evaluation type code and press TAB.
- Enter the evaluation type description and press TAB.
- Enter YES or NO if the evaluation was an observation.
- Click SAVE to lock in the new information.

## Finding an Existing Evaluation Type

In order to edit/change or remove an evaluation type, it is necessary to locate the type. **HUMAN RESOURCES** allows the user to locate files using the SORT method with two search options.

**Type**                      Activate the TYPE radio button (in the Sort box) and type in the evaluation type.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the description.

## To edit an evaluation type

- Click the desired evaluation type from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## To delete an evaluation type

- Click the desired evaluation type from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this evaluation record?"
- Click YES to delete the evaluation record.

- Click NO to keep the evaluation record.

**To exit from Evaluation Types**

- Click the EXIT button to return to the Human Resources Main Menu.

# Civil Service Codes

The path to the Civil Service Codes screen is Maintenance → Civil Service Codes. The civil service codes listing provides the user with the ability to create, edit, and define civil service codes to categorize and report eligible employees. For a screen image please click Civil Service Codes.

- Select Civil Service Codes. A listing of civil service codes will be displayed in alpha-numerical order.

## Adding a Civil Service Code

- Click the ADD button.
- Enter the civil service alpha and numeric codes, if any, and press TAB after each.
- Enter the civil service code title and press TAB.
- Enter the civil service time requirement, if any, and press TAB.
- Enter the jurisdiction code for the reporting county and press TAB.
- Enter the code's status: ACTIVE or INACTIVE and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Civil Service Code

In order to edit/change or remove a civil service code, it is necessary to locate the code. **HUMAN RESOURCES** allows the user to locate files using the SORT method with two search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the civil service code.

**Title**                      Activate the TITLE radio button (in the Sort box) and type in the first few characters of the title.

## Editing a civil service code

- Click the desired civil service code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting a civil service code

- Click the desired civil service code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this civil service code?"

- Click YES to delete the code.
- Click NO to keep the code.

#### **Exiting from Civil Service Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

# Certification Types

The path to the Certification Types screen is Maintenance → Certification Types. Certification types are the master certification categories. For a screen image please click Certification Types.

- Select Certification Types. A listing of certification types will be displayed in alphabetical order.

## Adding a Certification Type

- Click the ADD button.
- Enter the certification type and press TAB.
- Enter the description and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Certification Type

In order to edit/change or remove a certification type, it is necessary to locate the type. Human Resources allows the user to locate files using the SORT method with two search options.

**Type**                      Activate the TYPE radio button (in the Sort box) and type in the certification type.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the description.

## Editing a certification type

- Click the desired certification type from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting a certification type

- Click the desired type from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this certification code?"
- Click YES to delete the certification code.
- Click NO to keep the certification code.

## Exiting from Certification Types

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.



# Cobra Types Maintenance

The Cobra Type Maintenance function is accessed by selecting the Cobra Types option from the Maintenance drop-down menu. This function is used to create and maintain the Cobra Codes used on the Employee Dependents window. For a screen image please click Cobra Types.

- Select Cobra Types. A listing of existing Cobra Type Codes is displayed in alphanumerical order.

## Adding a Cobra Type Code

- Click the ADD button.
- Enter the Cobra Code (up to 8 characters) and press TAB.
- Enter the description of the Cobra Code (up to 25 characters) and press TAB.
- Enter the length (in months) of the Cobra benefit and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Cobra Type Code

In order to edit/change or remove a Cobra Type code, it is necessary to locate the code. HUMAN RESOURCES allows the user to locate files using the SORT method with two search options.

- |                    |   |
|--------------------|---|
| <b>Code</b>        | This option is used to search for a Cobra Type record by code. Activate the CODE radio button (in the Sort box) and type in a starting Cobra Code service code. The entered code (or the next closest match) is displayed at the top of the browser on the left-hand side of the window and the corresponding Cobra Type record is displayed on the right-hand side of the window.  |
| <b>Description</b> | This option is used to search for a Cobra Type record by description. Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the Cobra Type description. The entered description (or the next closest match) is displayed at the top of the browser on the left-hand side of the window and the corresponding Cobra Type record is displayed on the right-hand side of the window. |

## Editing a Cobra Type Code

- Highlight the Cobra Type Code in the browser.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting a Cobra Type Code

- Highlight the Cobra Type Code in the browser.
- Click the DELETE button. Confirm that this is the correct record that you wish to delete. Click YES to delete the Cobra Type record. Click NO if you do not wish to delete the Cobra Type record.

## Exiting from Cobra Type Code Maintenance

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

# Employee Calendar Codes

The path to Employee Calendar Codes screen is Maintenance → Employee Calendar Codes. Employee Calendar Codes are used by Human Resources to categorize employee type attendance records. Codes are used to maintain non-working days for employee types. For a screen image please click Employee Calendar Codes.

- Select Employee Calendar Codes. A listing of calendar codes will be displayed in alphabetical order.

## Adding a Calendar Code

- Click the ADD button.
- Enter the calendar code and press TAB.
- Enter the description and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Calendar Code

In order to edit/change or remove an employee calendar code, it is necessary to locate the code. Human Resources allows the user to locate files using the SORT method with two search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the calendar code.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the description.

## Editing a calendar code

- Click the desired calendar code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting a calendar code...

- Click the desired calendar code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this attendance-calendar code?"

- Click YES to delete the attendance-calendar code.
- Click NO to keep the attendance-calendar code.

**To exit from Employee Calendar Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

# Health Event Types

Health Events are types of medically related occurrences, for which employees are screened. Employees may be required to have an annual physical, and yet the required elements might be different for different employee types. For example, only cafeteria workers might be required to have an annual Hepatitis B screen, while only bus drivers must (as per federal regulations) have a drug/ETOH screening. The Drug/ETOH (ETOH is a medical term for alcohol) screenings might be more frequent than once a year. While this does not explain the current federal regulations, it does point out the software flexibility in meeting employee requirements. The path to the Health Event Types screen is Maintenance → Health Event Types. For a screen image please click Health Event Types.

- Select Health Event Types. A listing of health event types will be displayed in alphabetical order.

## Adding a Health Event Type

- Click the ADD button.
- Enter the event and press TAB.
- Enter the next due as the default due date and press TAB.
- Enter any special instructions or comments and press TAB.
- Click SAVE to lock in the new information.

## Editing a health event

- Click the desired health event from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## Deleting a health event

- Click the desired health event from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this health event?"
- Click YES to delete the health event.
- Click NO to keep the health event.

## Exiting from Health Event Types

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu

# Position Codes

The path to the Position Codes screen is Maintenance → Position Codes. Position Codes are master codes for tracking employee job assignments. For a screen image please click Position Codes.

- Select Position Codes. A listing of position codes will be displayed in alphabetical order.

## Adding a Position Code

- Click the ADD button.
- Enter the position code and press TAB.
- Enter the description and press TAB.
- Enter the civil service code or click the magnifying glass button to view available codes. Select a code and click OK and press TAB.
- Enter the primary building or click the magnifying glass button to view available buildings. Select a building and click OK and press TAB.
- Enter the total full time equivalents (FTE) of this position (e.g. if there will be 5 FTE's in this position, enter 5.0) and press TAB.
- Enter the certification or click the magnifying glass button to view a list of available certification types. Select a type and click OK and press TAB.
- Enter the tenure area or click the magnifying glass button to view a list of tenure area codes. Select a code and click OK and press TAB.
- Click SAVE to lock in the new information.

## Finding an Existing Position Code

In order to edit/change or remove a position code, it is necessary to locate the code. Human Resources allows the user to locate files using the SORT method with three search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the position code.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the first few characters of the description.

**Certification**            Activate the CERTIFICATION TYPE radio button (in the Sort box) and type in the first few characters of the certification type.

## Editing a position code

- Click the desired position code from the list.
- Click the UPDATE button.

- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

### **Deleting a position code**

- Click the desired position code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this position record?"
- Click YES to delete the position code.
- Click NO to keep the position code.

### **Exiting from Position Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Retirement System Codes

The path to the Retirement System Codes screen is Maintenance → Retirement System Codes. For a screen image please click Retirement System Codes.

- Select Retirement System Codes. A list of codes is displayed in alphabetical order

## Adding Retirement System Codes

- Click the ADD button.
- Enter the retirement system code and press TAB.
- Enter the description and press TAB.
- Enter the payroll system flag and press TAB.
- Enter the employer limit and press TAB.
- Enter the employer percentage and press TAB.
- If the employer makes matching contributions, type YES and press TAB.
- Click SAVE to lock in the new changes.

## Finding an Existing Retirement System Code

In order to edit/change or remove a retirement system code, it is necessary to locate it. **HUMAN RESOURCES** allows the user to locate files using the SORT method with two search options.

**Code**                    Activate the CODE radio button (in the Sort box) and type in the retirement code.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type the first few characters of the retirement description.

## Editing a retirement system code

- Click the desired retirement code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## Deleting a retirement system code

- Click the desired retirement code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this retirement code?"
- Click YES to delete the retirement code.



- Click NO to keep the retirement code.

### **Exiting from Retirement System Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Tenure Area Types

The path to the Tenure Area Types screen is Maintenance → Tenure Area Types. Tenure Area Types are the master tenure categories. For a screen image please click Tenure Area Types.

- Select Tenure Area Types. A list of tenure types is displayed in alphabetical order.

## Adding a Tenure Area Type

- Click the ADD button.
- Enter the tenure code press TAB.
- Enter the description and press TAB.
- Click SAVE to lock in the changes.

## Finding an Existing Tenure Area Type

In order to edit/change or remove a tenure area type, it is necessary to locate it. Human Resources allows the user to locate files using the Sort method with two search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the tenure area code.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type the first few characters of the description.

## Editing a tenure area type

- Click the desired tenure code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

## Deleting a tenure area type

- Click the desired tenure code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this tenure record?"
- Click YES to delete the tenure code.
- Click NO to keep the tenure code.

## Exiting from Tenure Area Types

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

# Bargain Units

To access the Bargain Units Maintenance function, select the Bargain Units option from the Maintenance drop-down menu. For a screen image, please click Bargain Units.

The Bargain Units Maintenance function allows you to add and maintain the various bargaining units associated with the employees in your district. Each bargaining unit can then be linked to a specific employee type through Employee Type Maintenance.

Upon selecting the Bargain Units Maintenance function, a listing of bargaining units is displayed in alphanumerical order.

Field	Description
Code	(Required) The code that uniquely identifies the bargaining unit. The code can be up to 8-alphanumeric characters in length.
Description	(Required) The description of the bargaining unit code. The descriptive text can be up to 20 characters in length.
Contract Days	Indicate the number of days in the bargaining unit's contract.
Union Affiliation	Enter the name (up to 25 characters) of the union affiliated with the bargaining unit.
Union Rep	Enter the name of the bargaining unit's union representative (up to 20 characters).

## Adding a Bargain Unit Record

- Select the Add button.
- Enter code and description. If applicable, enter the contract days, union affiliation, and union representative.

- Select the Save button to lock in the new information.

## Finding a Bargain Unit Record

In order to edit/change or remove a bargain unit code, you must first identify the appropriate record. **HUMAN RESOURCES** allows you to locate records using the SORT method with two search options.

**Code** Select the Code radio button in the Sort box and type in all or part of the bargain unit code. The starting point of the records in the listing is based on the sort criteria you enter.

**Description** Select the Description radio button in the Sort box and type in all or part of the bargain unit description. The starting point of the records in the listing is based on the sort criteria you enter.

## Editing a Bargain Unit Record

- Highlight the appropriate bargain unit record from the list.
- Select the Update button.
- Make changes by typing over the existing data.
- Select the Save button to lock in the new information.

## Deleting a Bargain Unit Record

- Highlight the appropriate bargain unit record from the list.
- Select the Delete button.
- Confirm that this is the correct record that you wish to delete. Click Yes to delete the record. Click No if you do not wish to delete the record.

**NOTE:** You may not delete a bargain unit code that is already associated with an employee type and/or a coverage type.

## **Exiting from Bargain Unit Maintenance**

- Select the Exit button to return to the **HUMAN RESOURCES** Main Menu.

# Employee Notes

Human Resources provides the user with the ability to add and maintain an unlimited number of notes for each tab of the Employee Information section. To add, view, or edit the notes for an employee:

- Locate the employee using the Employee Tab
- Choose any tab of the employee's record
- Click the NOTES button
- Use the Notes For drop down list to select the type of note
- To delete the existing note, click the DELETE button
- Human Resources will ask the user, "Delete this employee note?" Click YES to remove the note or click NO to keep the note.
- Type the new note and click SAVE
- Click the EXIT button to return to the employee's information

# Payroll Maintenance



## Payroll Maintenance

The path to the Payroll Maintenance menu is Maintenance → Payroll Maintenance. The Payroll Maintenance section includes the utilities generally controlled by the payroll department. The maintenance items include departments, buildings, the chart of accounts, direct deposit banks, deduction codes, earning codes, pay frequencies and tax tables.

- Payroll Maintenance. A sub-menu will appear:

**Departments...**

**Buildings...**

**Chart of Accounts...**

**Deduction Codes...**

**Pay Frequencies...**

**Earning Codes...**

**Direct Deposit Banks...**

**Tax Tables...**

## Departments

The path to the Departments screen is Maintenance → Payroll Maintenance → Departments. A department is an individual segment, such as a specific division or department, of the municipal entity that is segregated for reporting purposes. Users may want to create and maintain departments to enhance the relevance of data in Human Resources. The departments section provides the user with the ability to create, edit, and define department codes used within the system. For a screen image please click Departments.

- Select Departments. A list of departments is displayed in alphabetical order.

### Adding a Department

- Click the ADD button.
- Enter the department number or code (up to 5 characters) and press TAB.
- Enter the department description and press TAB.
- Click SAVE to lock in the new information.

### Finding an Existing Department

In order to edit/change or remove a department code, it is necessary to locate the code. Human Resources allows the user to locate files using the SORT method with two search options.

**CODE** Allows the user to type in the department code number being searched.

**NAME** Allows the user to search by department name.

### Editing a department code

- Click the desired department from the list.
- Click the UPDATE button.
- Press TAB until the information to be change is highlighted.
- Enter the correct information and click Save. **HUMAN RESOURCES** will automatically replace the old data wit the new data

### Deleting a department code

- Click the desired department from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this department?"
- Click YES to delete the department.

- Click NO to keep the department.

### **Exiting from Departments**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Buildings

The path to the Buildings screen is Maintenance → Payroll Maintenance → Buildings. The building listing provides the user with the ability to create, edit, and define the individual building codes used within the system. For a screen image please click Buildings.

- Select Buildings. A list of buildings is displayed in alphanumeric order.

### Adding a Building

- Click the ADD button.
- Enter the building code (up to 5 characters) and press TAB.
- Enter the building name and press TAB.
- Enter the building address and press TAB.
- Enter the contact and press TAB.
- Click SAVE to lock in the new information.

### Finding an Existing Building

In order to edit/change or remove a building code, it is necessary to locate the code. Human Resources allows the user to locate files using the SORT method with two search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the building code.

**Name**                      Activate the NAME radio button (in the Sort box) and type the building name.

### Editing a building code

- Click the desired building from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

### Deleting a building code

- Click the desired building from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this building?"
- Click YES to delete the building.

- Click NO to keep the building.

### **Exiting from Buildings**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Chart of Accounts

The path to the Charts of Accounts screen is Maintenance → Payroll Maintenance → Chart of Accounts. The chart of accounts provides the user with the ability to create, edit, and define the individual budgetary account codes used within the system. For a screen image please click Accounts.

- Select Chart of Accounts. A list of account codes will be displayed in alpha-numeric order.

### Adding an Account

- Click the ADD button.
- Enter the account number and press TAB.

### Accounting Tips:

**0 Account numbers should begin with the individual fund letter followed by the account number as indicated by the New York State Uniform Chart of Accounts. Your fund's specific account number format is designated under the specification of each fund. Be sure to follow your specified account code format.**

- Enter the account name and press TAB.
- Enter a valid fund code or click the magnifying glass to view available codes. Select a code and click OK and press TAB.
- Select the account type from the drop down list and press TAB.
- Select the account status from the drop down list and press TAB.
- Enter the state consolidation code or click the magnifying glass to view available codes. Select a code and click OK and press TAB.
- Click SAVE to lock in the new information.

### Finding an Existing Account

In order to edit/change or remove an account code, it is necessary to locate the code. Human Resources allows the user to locate files using the SORT method with four search options.

**Account** Activate the ACCOUNT radio button (in the Sort box) and type in the account number.

**Name** Activate the NAME radio button (in the Sort box) and type the first few characters of the account name.

**Type** Activate the TYPE radio button (in the Sort box) to sort by the type of account.

**Status**                    Activate the STATUS radio button (in the Sort box) to sort by the status of the account.

#### **Editing an account code**

- Click the desired account from the list.
- Click the UPDATE button.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

#### **Deleting an account code**

- Click the desired account from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this account?"
- Click YES to delete the account.
- Click NO to keep the account.

#### **Exiting from Chart of Accounts**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Deduction Codes

The path to the Deduction Codes screen is Maintenance → Payroll Maintenance → Deduction Codes. Deduction codes are used by Human Resources to categorize and standardize employee payroll deductions. For a screen image please click Deduction Codes.

- Select Deduction Codes. A list of all codes will be displayed in alphabetical order.

### Adding a Deduction Code

- Click the ADD button.
- Enter the deduction code (up to nine characters) and press TAB.
- Enter the description and press TAB.
- If the deduction is an annuity, type “Y” and press TAB.
- If the deduction is a savings bond deduction, type “Y” and press TAB.
- If the deduction is a flex deduction, type “Y” and press TAB.
- If a flex deduction select the flex type from the drop down list and press TAB.
- Select the deduction type from the drop down list or type “B” for Before taxes from Gross, “D” for Deduction from Net After Tax and press TAB.
- If the deduction requires a bank account number (i.e. credit union deductions), type “Y” and press TAB.
- If the deduction is to be excluded from the current payroll calculation, type “Y” and press TAB.
- Enter the print position for this deduction.
- Enter the pay frequency or click the magnifying glass button to view available pay frequencies. Select a frequency and click EXIT and press TAB. The user can also add a pay frequency by clicking ADD.
- Enter the default number of times this deduction will be taken per year and press TAB.
- Select the default deduction year from the drop down list and press TAB.
- Select the default deduction type from the drop down list and press TAB.
- Enter the default fixed amount for this deduction and press TAB.
- Enter the default dollar limit for this deduction and press TAB.
- Enter the general ledger account code the deduction is to be recorded in, if any, or click the magnifying glass button to view available account codes. Select a code and click EXIT and press TAB. The user can also add an account code by clicking ADD.
- Enter the vendor number or click the magnifying glass button to view available vendors. Select a vendor and click EXIT and press TAB. The user can also add a vendor by clicking ADD.
- Click SAVE to lock in the new information.

### Finding an Existing Deduction Code

In order to edit/change or remove a deduction code, it is necessary to locate the code. **HUMAN RESOURCES** allows the user to locate files using two search options



<b>Code</b>	Activate the CODE radio button (in the Sort box) and type in the deduction code.
<b>Description</b>	Activate the DESCRIPTION radio button (in the Sort box) and type the first few characters of the description.
<b>Type</b>	Activate the TYPE radio button (in the Sort box) and to sort by the type of deduction code.

#### **To edit a deduction code**

- Click the desired deduction code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter in the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

#### **Deleting a deduction code**

- Click the desired deduction code from the list.
- Click the DELETE button. **HUMAN RESOURCES** s will ask, "Delete this deduction?"
- Click YES to delete the deduction code.
- Click NO to keep the deduction code.

#### **Exiting from Deduction Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Pay Frequencies

The path to the Pay Frequencies screen is Maintenance → Payroll Maintenance → Pay Frequencies. **HUMAN RESOURCES** uses pay frequency codes to categorize when employee supplemental earnings and voluntary deductions are earned or taken. The frequencies serve as switches that can be turned on when the earning or deduction is desired. For a screen image please click Pay Frequencies.

- Select Pay Frequencies. A list of all codes will be displayed in alphabetical order.

### Adding a Pay Frequency

- Click the ADD button.
- Enter the frequency code (up to four characters) and press TAB.
- Enter the description and press TAB.
- Enter the number of checks per year to be paid to the employees in this pay frequency and press TAB.
- Select the type of frequency from the drop down list or type "B" for Both, "D" for Deductions or "E" for Earnings and press TAB.
- Click SAVE to lock in the new information.

### Finding an Existing Pay Frequency

In order to edit/change or remove a pay frequency, it is necessary to locate it. **HUMAN RESOURCES** allows the user to locate files using the SORT method with two search options.

**Code**                      Activate the CODE radio button (in the Sort box) and type in the frequency code.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type the first few characters of the description.

### Editing a pay frequency

- Click the desired pay frequency from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

### Deleting a pay frequency

- Click the desired pay frequency from the list.

- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this pay frequency?"
- Click YES to delete the pay frequency.
- Click NO to keep the pay frequency.

#### **Exiting from Pay Frequencies**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Earning Codes

The path to the Earnings Code screen is Maintenance → Payroll Maintenance → Earning Codes. Earning codes are used by Human Resources to categorize employee earnings and assist in budgetary reporting. Payroll information defined in earning codes is used in calculating payroll for those earning situations. For a screen image please click Earning Codes.

- Select Earning Codes. A list of codes will be displayed in alphabetical order.

### Adding an Earning Code

- Click the ADD button.
- Enter the earning code (up to eight characters) and press TAB.
- Enter the description and press TAB.
- Select the earning type from the drop down list and press TAB.
- Select the wage type from the drop down list and press TAB.

### **Payroll Tips:**

**0 Reimbursement earning codes may be used to reimburse employees for valid business expenses through the payroll system. They are used in lieu of direct payments from the General Fund through the accounts payable system. The reimbursements are reported on the employee's Form W-2 at year end.**

- If the earning should be included in contractual calculations, type "Y" and press TAB.
- Enter the print position and press TAB.
- Enter the default pay frequency or click the magnifying glass button to view a list of frequencies. Select a frequency and click EXIT and press TAB. The user can also add a pay frequency by clicking ADD.
- Enter the default times paid per year and press TAB.
- Enter the default fixed amount for this earning and press TAB.
- Select the default year (Fiscal or Calendar) and press TAB.
- Enter the default year-to-date dollar limit and press TAB.
- Enter the general ledger account code the earning is to be recorded in or click the magnifying glass button to view a list of accounts. Select the account and click EXIT and press TAB. The user can also add an account code by clicking ADD.
- Click SAVE to lock in the new information.

### Finding an Existing Earning Code

In order to edit/change or remove an earning code, it is necessary to locate the code. Human Resources allows the user to locate files using two search options

- Code**                      Activate the CODE radio button (in the Sort box) and type in the earning code
- Description**            Activate the DESCRIPTION radio button (in the Sort box) and type the first few characters of the description
- Amount Type**            Activate the AMOUNT TYPE radio button (in the Sort box) to sort by the Account type.

#### **Editing an earning code**

- Click the desired earning code from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

#### **Deleting an earning code**

- Click the desired earning code from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this earning code?"
- Click YES to delete the earning code.
- Click NO to keep the earning code.

#### **Exiting from Earning Codes**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Direct Deposit Banks

The path to the Direct Deposit Banks screen is Maintenance → Payroll Maintenance → Direct Deposit Banks. The direct deposit banks menu provides the user with the ability to create, edit, and define the different bank codes used in conjunction with direct deposit by the system. For a screen image please click Direct Deposit Banks.

- Select Direct Deposit Banks. A list of bank codes will be displayed in alphabetical order.

### Adding a Bank

- Click the ADD button.
- Enter the bank code and press TAB.
- Enter the bank's routing number and press TAB.
- Enter the bank name and press TAB.
- Enter the bank address and press TAB.
- Enter the bank contact and phone number and press TAB after each.
- Click SAVE to lock in the new information.

### Finding an Existing Bank

In order to edit/change or remove a bank, it is necessary to locate it. Human Resources allows the user to locate files using the SORT method with three search options.

<b>Code</b>	Activate the CODE radio button (in the Sort box) and type in the bank code.
<b>Name</b>	Activate the NAME radio button (in the Sort box) and type the first few characters of the bank name.
<b>City</b>	Activate the CITY radio button (in the Sort box) and type the first few characters of the city.

### Editing a bank

- Click the desired bank from the list.
- Click the UPDATE button.
- Press TAB until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

### Deleting a bank

- Click the desired bank from the list.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this bank?"
- Click YES to delete the bank.
- Click NO to keep the bank.

### **Exiting from Direct Deposit Banks**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

## Tax Tables

Human Resources uses tax tables to calculate employee payroll taxes. The user may use either multiple tax tables for employees residing in different municipalities or the standard federal and state tables provided. The tax tables are contained in a folder with three tabs: Information, Calc Method, and Tax Table.

- **Select Tax Tables.** The tax tables information tab will be displayed, listing all tables in alphabetical order.

**Information tab** Lists the different tax tables and their descriptions in alphabetical order.

**Calc Method tab** Defines the applicable tax percentages used in tax calculation, maximum taxable amounts, and the general ledger account for these withholding amounts.

**Tax Table tab** Defines the withholding allowance amount and wage brackets for varying tax brackets.

### Adding a Tax Table

#### **Information tab:**

- Click the ADD button. Human Resources will display a blank information screen.
- Enter the tax table code (up to three characters) and press TAB.
- Select the tax authority "F" for Federal Withholding, press "F" again for Federal EIC, or press "C" for City withholding and press TAB.
- Enter the description and press TAB.
- Enter the tax reporting ID and press TAB.
- Enter the general ledger account code the tax liability is to be recorded in and press TAB. Click the magnifying glass button to display the available accounts. Select an account and click EXIT. The user can also add an account code by clicking ADD.
- Click SAVE to lock in the new information.

#### **Calc Method tab:**

##### **For Federal Tax Authorities...**

The following exemptions are available for federal tax authorities:

Fed W/H	Federal Withholding Tax
Emp FICA	Employee FICA Withholding Tax



Empr FICA      Employer FICA Tax Expense

Emp Medi      Employee Medicare Withholding Tax

FUI              Federal Unemployment Insurance Expense

- Select the desired federal tax table from the Information tab.
- Click the Calc Method tab.
- Enter the employer FICA percentage and press TAB.
- Enter the employee FICA percentage and press TAB.
- Enter the maximum FICA wages and press TAB.
- Enter the employer Medicare percentage and press TAB.
- Enter the employee Medicare percentage and press TAB.
- Enter the maximum Medicare wages and press TAB.
- Enter the general ledger account codes the FICA/Medicare expense and the FICA/Medicare liabilities are to be recorded in and press TAB after each. To view a list of accounts, click the magnifying glass button. Select an account and click EXIT. The user can also add accounts by clicking ADD.
- Enter the federal unemployment insurance percentage and press TAB.
- Enter the maximum wages subject to federal unemployment insurance and press TAB.
- Enter the general ledger account codes the federal unemployment insurance expense and the federal unemployment insurance liabilities are to be recorded in and press TAB after each. Click the magnifying glass button to view a list of accounts. Select an account and click EXIT.
- Click SAVE to lock in the new information.

#### **For State Tax Authorities...**

The following exemptions are available for state tax authorities:

State W/H      State Withholding Tax

SUI              State Unemployment Insurance Expense

- Select the desired state tax table from the Information tab.
- Click the Calc Method tab.
- Enter the calculation basis: "D" for directly calculated or "P" for a percentage of the federal tax liability and press TAB.
- Enter the gross wage cutoff amount, which is the amount over which taxes will not be calculated and press TAB.
- Enter the base gross percentage and press TAB.
- Enter the standard gross pay percentage and press TAB.
- Enter the federal withholding adjustment percentage and press TAB.
- If the withholding should be adjusted for the FICA withholding, enter YES and press TAB.
- Enter the minimum and maximum standard adjustments and press TAB after each.
- Enter the state unemployment insurance and press TAB.
- Enter the maximum wages subject to state unemployment insurance and press TAB.
- Enter the general ledger account codes the state unemployment insurance expense and the state unemployment insurance liability are to be recorded in and press TAB after each. To view a list of accounts click the magnifying glass button. Select an account and click EXIT. The user can also add accounts by clicking ADD.
- Enter the standard single deduction and press TAB.

- Enter the standard married deduction and press TAB.
- Click SAVE to lock in the new information.

### **For City Tax Authorities...**

The following exemptions are available for city tax authorities:

#### **City W/H      City Withholding Tax**

- Select the desired city tax table from the Information tab.
- Click the Calc Method tab.
- Do Steps 1-12 for state tax authorities (above)
- Click SAVE to lock in the new information.

### **Tax Table tab (for all tax authorities):**

- Select the desired tax authority from the Information tab.
- Click the Tax Table tab.
- Enter the withholding allowance amount and press TAB.
- Enter the supplemental withholding rate and press TAB.
- Enter the annual single withholding tax table with the withholding amount, percentage rate, and tax bracket limit for each line. Press TAB after each line.
- Enter the annual married withholding tax table with the withholding amount, percentage rate, and tax bracket limit for each line. Press TAB after each line.
- Click SAVE to lock in the new information.

### **Editing a Tax Table**

**HUMAN RESOURCES** provides the user with the ability to edit and change the tax tables as current tax regulations change.

- Click the desired tax authority from the Information tab.
- Click the tab with the information to be changed.
- Click the UPDATE button.
- Press TAB until the information to be changes is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.

### **Deleting a Tax Table**

- Click the desired tax authority from the Information tab.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this Tax Table?"
- Click YES to delete the table.
- Click NO to keep the table.

### **Exiting from Tax Tables**

- Click the EXIT button to return to the **HUMAN RESOURCES** Main Menu.

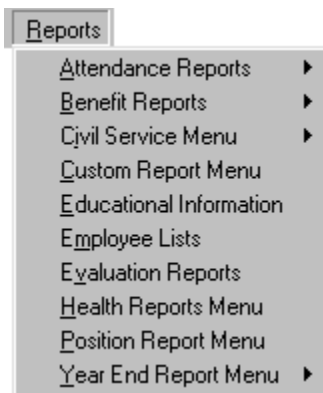
# Reports

# Output Reports

The reports section provides a variety of standard reports which the user may either display on screen, save to a text file, or send to the printer. These reports include employee listings, attendance reports, benefit reports, evaluation reports, educational reports, and year-end-reports. The select a report click Reports from the main menu bar.

## The drop down menu

There are ten reports areas to select from on the drop-down menu: Attendance Reports, Benefit Reports, Civil Service Menu, Custom Report Menu, Educational Information, Employee Lists, Evaluation Reports, Health Reports Menu, Position Report Menu, and Year-End Report Menu. Users can select the desired option by clicking once on the desired section.



## The Standard Human Resource Report Interface

The reports use a standard interface, which uses a common series of selection lists to simplify all human resource reports. The standard interface allows the user to select the desired information to include in each report based on three categories:

- employee types
- buildings
- departments

The default setting for the pick lists of these categories is to select all items for each group. If the user would like to select the information to be included click the magnifying glass for each category to bring up a listing of all the available items. Desired items can be selected or deselected by clicking on them. The selected items will be highlighted in blue.

The standard interface also requires the user to enter:

- the starting and ending name range to process
- the status of employees to be included: active, inactive, retirees, on leave, or temporary

Additional information, such as sorting order or report type may be required for each specific report.

# Custom Report Menu

The path to the Custom Report Menu is Reports → Custom Report Menu. The Custom Report Menu allows each user to call upon special custom utilities provided to the user by **FINANCE MANAGER**. For a screen image please click Custom Report Menu.

- Select Custom Report Menu.
- Select the desired utility.
- Click RUN to run the custom report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

# Position Report Menu

This screen allows the user to choose from three reports, which allows analysis of current employee position utilization. For a screen image please click Position Report.



- Select Position Report.
- Select the positions to be included.
- Select report type:

Position List Report

Surplus Tracking Report

Vacancy Tracking Report

- If the report type select is Position List Report then select if the report should be ordered by Position Code or by Building. Select whether the report should be ordered by position code or building and press TAB.
- For all reports, select whether the report should have page breaks and press TAB.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .



# Attendance Reports

## Attendance Reports

The path to the Attendance Reports screen is Reports → Attendance Reports. The attendance reports sub-menu maintains reports to produce attendance-based reports. The list includes daily and monthly attendance reports, attendance worksheets, and individual employee listings.

- Select Attendance Reports. A sub-menu appears:

**Accumulated Sick Leave Notice**

**Attendance Analysis Reports**

**Attendance Detail Reports**

**Attendance Worksheet**

**Compensated Absence Listing**

**Daily Attendance Report**

**Employee Attendance Report**

**Employees with Negative Balances**

**Employee Calendar Report**

**Monthly Attendance Report**

**On Leave Status Report**

**Perfect Attendance Report**



**Time Summary Listing**

**Substitute Listing**

## Accumulated Sick Leave Notice

The path to the Accumulated Sick Leave Notice screen is Reports → Attendance Reports → Accumulated Sick Leave Notice. For a screen image please click Accumulated Sick Leave Notice.

- Select Accumulated Sick Leave Notice.
- Select the report criteria from the standard report interface.
- Enter the attendance notice parameters.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Attendance Analysis Reports

The path to the Attendance Analysis Reports screen is Reports → Attendance Reports → Attendance Analysis Reports. For a screen image please click Attendance Analysis Reports.

- Select Attendance Analysis Report.

### **These reports review attendance records for four types of analysis:**

- Consecutive Analysis – List how many times an employee has been absent for more than 'X' days.
- Weekday Analysis – List how many times an employee has been absent on a given weekday.
- Holiday Analysis – List employees who were absent a day before and after a given date.
- Yearly Routine Analysis – List employees who are absent at the same time every year.
- Select the report criteria from the standard report interface.
- Select the type of Analysis Report by clicking the radio button.
- Enter the employee selection criteria.
- Enter the employee Attendance sort criteria.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .


## Attendance Detail Reports

The path to the Attendance Detail Reports screen is Reports → Attendance Reports → Attendance Detail Reports.

**HUMAN RESOURCES** allows users to print an attendance worksheet for departments or buildings on which to manually summarize attendance data. For a screen image please click the report type.

- Select Attendance Detail Reports. Another sub-menu appears.
- Select the report type: By Employee Type, By Attendance Codes, By Date or By Name.
- Select the report criteria using the standard report interface.
- Enter the date range of the attendance period and press TAB.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Attendance Worksheet

The path to the Attendance Worksheet screen is Reports → Attendance Reports → Attendance Worksheet. For a screen image please click Attendance Worksheet.

- Select Attendance Worksheet.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Select the worksheet type: Blank or Review.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or



2) Saving to a file by clicking the save icon  .

## Compensated Absence Listing

The path to the Compensated Absence Listing screen is Reports → Attendance Reports → Compensated Absence Listing.

This section produces a report listing the attendance balances and daily rate for employees at a date. For a screen image please click [Compensated Absence Listing](#).

- Select Compensated Absence Listing.
- Select the Employee type(s) to be included.
- Select either Sick, Personal, or Vacation by clicking the radio button.
- Enter the effective date.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Daily Attendance Report

The path to the Daily Attendance Report screen is Reports → Attendance Reports → Daily Attendance Reports.

Human Resources allows user to print hardcopy reports of the daily attendance records. For a screen image please click Daily Attendance Report.

- Select Daily Attendance Report.
- Select the report criteria using the standard report interface.
- Enter the date range of the attendance period and press TAB.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .




## Employee Attendance Report

The path to the Employee Attendance Report screen is Reports → Attendance Reports → Employee Attendance Report. In addition to daily monitoring of attendance records, Human Resources can provide an absentee history for selected employees. For a screen image please click Employee Attendance Report.

- Select Employee Attendance Record.
- Select the report criteria using the standard report interface.
- Enter the employee attendance sort criteria.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:


1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .

## Employees with Negative Balances

The path to the Employee with Negative Balances screen is Reports → Attendance Reports → Employees with Negative Balances. This report lists all employees who have exceeded the attendance units earned. These employees may be reviewed to determine if they need to be docked. For a screen image please click Employees with Negative Balances.

- Select Employee with Negative Balance.
- Enter the starting and ending dates.
- Select if temporary employees should be included.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Employee Type Calendar Report

The path to the Employee Calendar Report screen is Reports → Attendance Reports → Employee Type Calendar Report. For a screen image please click Employee Type Calendar Report.

- Select Employee Calendar Report.
- Select the Employee Type(s) to be included.
- Select the Calendar Code(s) to be included.
- Enter the start and end dates.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or



2) Saving to a file by clicking the save icon  .

## Monthly Attendance Report

The path to the Monthly Attendance Report screen is Reports → Attendance Reports → Monthly Attendance Report.

Human Resources allows users to create summary reports of the attendance records on a monthly basis. For a screen image please click Monthly Attendance Report.

- Select Monthly Attendance Reports.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Enter the Fiscal Year date range.
- Select YES or NO to separate the page by each building's department.
- Select YES or NO to include Accrued/ Earned days.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## On Leave Status Report

The path to the On Leave Status Report screen is Reports → Attendance Reports → On Leave Status Report. For a screen image please click On Leave Status Report.

- Select On Leave Status Report.
- Enter the beginning and ending dates for the search.
- Click YES or NO to include returned employees only.
- Click YES or NO for temporary employees to be included.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or



2) Saving to a file by clicking the save icon  .

## Perfect Attendance Report

The path to the Prefect Attendance Report screen is Reports → Attendance Reports → Perfect Attendance Report.

Human Resources allows users to create a report of employees who have not incurred any chargeable days. For a screen image please click Perfect Attendance Report.

- Select Perfect Attendance Report.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Time Summary Listing

The path to the Time Summary Listing screen is Reports → Attendance Reports → Time Summary Listing

Human Resources allows users to create a time summary listing, displaying the annual, available, taken, and balances of an employee's sick, personal, vacation and comp time. For a screen image please click Time Summary Listing.

- Select Time Summary Listing.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Substitute Listing

The path to the Substitute Listing screen is Reports → Attendance Reports → Substitute Listing. For a screen image please click the report type.

- Select Substitute Listing. Another sub-menu appears.
- Select the sorting order either by Name, Building or Date.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .



# Benefit Reports

## Benefit Reports

The path to Benefit Reports is Reports → Benefit Reports. The benefit reports sub-menu maintains reports to produce benefit based reports. The lists include benefit listings, employee benefit status, and benefit census report.

- Select Benefit Reports. A sub-menu appears

**Benefit Census Report...**

**Benefit Listing...**

**Employee Benefit Status...**

**Expanded Benefit Profile...**

## Benefit Census Report

The path to the Benefit Census Report screen is Reports → Benefit Reports → Benefit Census Report. Human Resources can produce a census report listing statistical information for benefit providers. For a screen image please click Benefit Census Report.

- Select Benefit Census Report.
- Select the deduction codes to process.
- Select "YES" or "NO" to include salary or marital status.
- Enter an additional heading or leave blank.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Benefit Listing

The path to the Benefit Listing screen is Reports → Benefit Reports → Benefit Listing. Human Resources allows users to generate reports of the employee's benefit information. For a screen image please click Benefit Listing.

- Select Benefit Listing.
- Select the employee type range and benefit type range and click OK after each.
- Select the sorting method and press TAB.
- Select the coverage types to display and press TAB.
- Select the page separation method and press TAB.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Employee Benefit Status

The path to the Employee Benefit Status screen is Reports → Benefit Reports → Employee Benefit Status. For a screen image please click Employee Benefit Status.

- Select Employee Benefit Status.
- Select the report criteria using the standard report interface.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:


1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .

## Employee Benefit Waived

The path to the Employee Benefit Status screen is Reports → Benefit Reports → Employee Benefit Waived. For a screen image please click Employee Benefit Waived.

- Select the Employee Types to be included in the report. To select all employee types left click with the mouse in the select all employee types check box.
- Select the Insurance Types to be included in the report. To select all insurance types left click with the mouse in the select all coverage types check box.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

3) Print the report by clicking the print icon  or

4) Saving to a file by clicking the save icon .

## Expanded Benefit Profile

The path to the Expanded Benefit Profile screen is Reports → Benefit Reports → Expanded Benefit Profile. Human Resources allows the user to create a more detailed benefit report. For a screen image please click Expanded Benefit Profile.

- Select Expanded Benefit Profile.
- Select the report criteria using the standard report interface.
- Enter salary notice selection criteria.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Civil Service Menu



## Civil Service Menu

The path to the Civil Service Menu is Reports → Civil Service Menu. The Civil Service Menu lists the available civil service reports.

- Select Civil Service Menu. A sub-menu appears:



**Civil Service Report...**

**Civil Service Payroll Journal...**

## Civil Service Report

The path to the Civil Service Report screen is Reports → Civil Service Menu → Civil Service Report. For a screen image please click Civil Service Report.


- Select Civil Service Report.
- Select the report criteria using the standard report interface.
- Enter the desired payroll date.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:


- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Civil Service Payroll Journal

The path to the Civil Service Payroll Journal screen is Reports → Civil Service Menu → Civil Service Payroll Journal. This option creates a standard payroll transactions journal with the employee's civil service codes and titles. For a screen image please click Civil Service Payroll Journal.

- Select Civil Service Payroll Journal.
- Enter the payroll check date range.
- Enter the employee name range.
- Select to have the report displayed in summary or detail.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## **Educational Information**

## Educational Information



The path to the Educational Information menu is Reports → Educational Information. The educational information sub-menu produces reports of employee educational information. The reports include an approved courses pending listing and an employee educational listing report.

- Select Educational Information a sub-menu appears: approved courses pending, employee educational listing.

## Approved Courses

The path to the Approved Courses screen is Reports → Educational Information → Approved Courses. Human Resources allows users to generate a schedule of educational courses taken by employees and those courses still pending. Pending courses are those courses entered into the system without a grade and completion date. For a screen image please click Approved Courses.

- Select Approved Course Report.
- Select YES or NO to have the report display separate pages for each employee.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Employee Educational Listing

The path to the Employee Educational Record screen is Reports → Educational Information Menu → Employee Educational Listing. Human Resources can provide a summary of an employee's educational status, listing all courses taken to date and their potential impact on the employee's next degree step/level increase. For a screen image please click Employee Educational Listing.

- Select Employee Educational Record.
- Select the Employee type(s), building(s) and department(s) to be included.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Select to have report grouped by employee type, building or department.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

# Employee Lists



## Employee Lists

The path to the Employee Lists sub-menu is Reports → Employee Lists.


The employee list sub-menu maintains reports to produce listings of employees by a variety of sorting methods. These include lists of names, mailing labels, employee directories, personnel files, seniority reports, date of birth reports, and civil service reports.


- Select Employee Lists.

## Birthday Listing

The path to the Birthday Listing screen is Reports → Employee Lists → Birthday Listing. Human Resources provides users the ability to create a birthday listing of all active employees (i.e. employees in month and date order for recognizing staff birthdays). For a screen image please click Birthday Listing.

- Select Birthday Listing.
- Select the report criteria using the standard report interface.
- Enter the month range.
- Select YES or NO to include Known or Unknown birthdays.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Date of Birth Reports

Human Resources provides users the ability to create a date of birth listing. The program will find, by default, the first birthday amongst all employees as the start date. For a screen image please click Date of Birth Reports.

- Select Date of Birth Report.
- Select the report criteria using the standard report interface.
- Select the date of birth date range.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Certification List

This report lists employees by certification type. For a screen image please click Certification List.

- Select Certification List.
- Select the report criteria using the standard report interface.
- Select to have the report sorted by Name, Certification or Date range.
- Select the report parameters.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .



## Employee Directory

This report lists all employees with their home addresses. For a screen image please click Employee Directory.

- Select Employee Directory.
- Select the report criteria using the standard report interface.
- Select the appropriate sorting criteria to have the report sorted by Name, Building, Employee Type, or Department.

**NOTE:** You may choose to include or exclude unlisted phone numbers by entering “Yes” or “No” in the Display Unlisted Phone Numbers field. The system will check the Private phone flag on the Employee Information window to determine which phones are unlisted. If the private phone flag is checked and the Display Unlisted Phone Numbers field is set to “No”, the employee’s phone number displays as UNLISTED on the Employee Directory Listing. If the private phone flag is checked and the Display Unlisted Phone Numbers field is set to “Yes”, the private phone number is displayed on the Employee Directory Listing.

- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

# EEOC Report

This report produces an Equal Employment Opportunity Commission Report.

- Select EEOC Report.

## Files Folder

- Under the Files tab, each employee type will be displayed on the left side of the screen. The right side of the screen will display the detail of the attendance days. For a screen image please click Files Folder or Print Folder .

## Editing the EEOC Report Information

- To edit or change information click the UPDATE button.
- Press Tab until the information to be changed is highlighted.
- Enter the correct information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new.

## Print Folder

- Select the report type Summary or Detail.
- If the detail is selected, select to have the report list the details by building or employee name.
- Click PRINT to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Mailing Labels

This report produces mailing labels for the selected employees. For a screen image please click Mailing Labels.



- Select Employee Mailing Labels.
- Select the report criteria using the standard report interface.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Mortality Report

This report gives a listing of all former employees, who are listed as deceased. For a screen image please click Mortality Report.

- Select Mortality Report.
- Select the report criteria using the standard report interface.
- Select the sorting method.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .



## Name Change

This report searches payroll records to find the employee name changes that have occurred over time. For a screen image please click Name Change.


- Select Name Change.
- Select the report criteria using the standard report interface.
- Select the sorting method.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Name Listings

This report displays a list of employees based on employee number, building, name, department and employee type. For a screen image please click Name Listings.

- Select Name Listings.
- Select the report criteria using the standard report interface.
- Select the sorting method.
- Select if the report should break onto separate pages.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

### Human Resources Tips:



**0 The Name Listing by Employee Number and Name Listing by Name Reports provide grand totals of the number of employees reported. An employee who has multiple appointments displays multiple times but is only counted one time in the report grand total.**

**The Name Listing by Employee Type, Building, and Department Reports will display an employee multiple times if that employee has multiple appointments. Totals are provided for each employee type, building, or department selected.**

## Personnel Files

This report displays an employee's personnel file. For a screen image please click Personnel Files.



- Select Personnel Files.
- Select the report criteria using the standard report interface.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## R.I.F. Report

This report displays a breakdown of potential savings during a reduction in force, under varying scenarios. For a screen image please click R.I.F. Report.


- Select R.I.F. Report.
- Select the report criteria using the standard report interface.
- Select the sorting method.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Seniority Report

This report creates a listing of employees based on their seniority. For a screen image please click Seniority Reports.

- Select Seniority Reports.
- Select the report criteria using the standard report interface.
- Select the sorting method.
- Select whether or not to use position codes, and thereby credit based on the percentage of the employees' status in that position. (For example, a 50% employee working for 10 years receives 5 years credit.) Press TAB.
- Select if the report should break onto separate pages and press TAB.
- Enter the seniority date range and press TAB.
- Enter the date as of which seniority will be calculated and press TAB.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .


### Human Resources Tips:


**0** Seniority and R.I.F. Reports will reduce the time worked by the cumulative amount of absence, which is not eligible for seniority. Attendance codes must specify whether or not they affect seniority.

## Tenure Listing

This report displays a listing of employees that have received Tenure and the area they received it in. For a screen image please click Tenure Listing.

- Select Tenure Listing.
- Select the report criteria using the standard report interface.
- Select the sorting criteria.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

# Evaluation Reports

## Completed Evaluations

This report displays a listing of the evaluations that were completed for each employee. For a screen image please click Completed Evaluations.

- Select Completed Evaluations
- Select the report criteria using the standard report interface
- Select the sort method, Evaluator, Last Date, Last Type, or Name.
- Select the desired page break and press TAB
- Select the desired date range and press TAB
- Select YES or NO to include Evaluations or Observations.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .




## Individual Employee Evaluation Listing

Human Resources can provide a summary of an employee's evaluations. For a screen image please click Individual Employee Evaluation Listing.

- Select Individual Employee Evaluation Listing
- Enter the employee number and press TAB. Click the magnifying glass to view the available employees. Select an employee and click OK.
- Select YES or NO to include evaluations and press TAB
- Select YES or NO to include observations and press TAB
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:


1) Print the report by clicking the print icon  or


2) Saving to a file by clicking the save icon  .

## Pending Evaluations

This report lists the evaluations scheduled and estimates the due date for those not scheduled. For a screen image please click Pending Evaluations.

- Select Pending Evaluations
- Select the report criteria using the standard report interface
- Select the sorting method and press TAB
- Select the desired page break and press TAB
- Select the option for all employees and press TAB
- Select whether the report should include evaluations or observations.
- Select the desired date range
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Evaluation Schedule

Human Resources allows users to generate a schedule of the next planned evaluations, by evaluation date. For a screen image please click Evaluation Schedule.

- Select Evaluation Schedule
- Select the report criteria using the standard report interface
- Select the sorting method and press TAB
- Select the desired page break options and press TAB
- Select the desired date range and press TAB
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

# Health Reports

## Employee Disabilities

This report gives a listing of all employees listed with a disability or a health event. For a screen image please click Employee Disabilities.


- Select Employee Disabilities.
- Select the report criteria using the standard report interface.
- Enter the date range.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Employee Health Events Due

This report summarizes a listing of employees who have one or more health event requirements due. It can be used to project those who will be coming due. For a screen image please click Employee Health Events Due.

- Select Employee Health Events Due.
- Select the report criteria using the standard report interface.
- Select the sort method: Name or Date.
- If the Date sort method select is Date, select YES or NO to have the report page break by due date.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:



1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

## Employee Type Requirements

This report lists the health event requirements for each employee type. For a screen image please click Employee Type Requirements.

- Select Employee Type Requirements.
- Select the report criteria using the standard report interface.
- Select the sort method: Name or Date.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Year-End Report Menu



## Year End Report Menu

The Year-End Report Menu provides the user with some reports unique to the fiscal year end. Some of the options are the salary confirmation letter and the attendance letter.

- Select Year-End Report Menu. A sub-menu appears:


**Year End Salary & Contracts...**


**Attendance Confirmation Letters...**

## Attendance Confirmation Letters

The path to the Attendance Confirmation Letters screen is Reports → Year End Report Menu → Print Attendance Confirmation Letter. This option prints the attendance balances in a letter format for the selected employees. For a screen image please click Attendance Confirmation Letters.

- Select Print Attendance Confirmation Letters.
- Select the report criteria using the standard report interface.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

1) Print the report by clicking the print icon  or

2) Saving to a file by clicking the save icon  .

# **Year-End Salary and Contract Letters**

## Year End Salary & Contracts

The path to the Year-End Salary & Contracts screen is Reports → Year End Report Menu → Year End Salary & Contracts. Human Resources provides for the entering and review of contract salary information for the new fiscal year before the current fiscal year ends. The user is also provided with utilities to delete the temporary salary data, to generate a temporary salary file for employees based upon their employee type, to print or view listings of the new salary data, to print basic contract letters from the data, and finally to move the new salary information into Earning Information.

- Select Year End Salary & Contract Menu.

**Clear All Contract Salary Information...**

**Generate Contract Salary Information...**

**Print Information Summary Listings...**

**Modify Contract Salary Information...**

**Printing Contract Letters...**

**Move Information to Employee Information...**

## Clear All Contract Salary Information

The path to the Clear All Contract Salary Information screen is Reports → Year End Report Menu → Year End Salary & Contract Letters → Clear All Contract Salary Information. For a screen image please click Clear All Contract Salary Information.

- Select Clear All Contract Salary Information.
- Select employee type(s) to clear. The selected types will be displayed in blue.
- Read the warning message and select YES or NO that you have read the warning message.
- Click OK to run the routine.

Human Resources will clear the temporary Year-End Salary file for the active contractual employees in the selected groups.

### **Human Resources Tips:**

**0** This will NOT clear the current contract information in the Earnings Information section. It ONLY clears the temporary working files for those employees.

## Generate Contract Salary Information

The path to the Generate Contract Salary Information screen is Reports → Year End Report Menu → Year End Salary & Contract Letters → Generate Contract Salary Information. For a screen image please click Generate Contract Salary Information.

- Select Generate Contract Salary Information.
- Select employee type(s) to generate. The selected types will be displayed in blue.
- Enter the effective date of salary increase and press TAB.
- Select whether the employee step should be increased automatically or by date and press TAB.
- Click OK to run the routine.

### Human Resources Tips:

**0** An Automatic assumption will increase every employee by one step for the beginning of the year. A by-date assumption will create a step increase on the employee's contract anniversary date.

- If the employee's contract anniversary date is not at the beginning of the year, Human Resources will create two (2) temporary salary files, one for each change in salary. Human Resources will automatically create a temporary file for each of the employees in the selected groups. Once generated, these temporary files may be reviewed and edited when necessary

### Human Resources Tips:



**0** For NEGOTIATIONS MANAGER users, if you have created salary schedules for the selected groups and defined them in Human Resources for use by the employee type, the generate process will automatically enter the contractual salary for the new fiscal year into the temporary salary file. It will also note when an employee has reached the highest step. Please be sure the salary schedule for the New Fiscal Year is defined in the Next Schedule section of the Employee Type Maintenance section.

## Print Information Summary Listings

The path to the Print Information Summary Listings screen is Reports → Year End Report Menu → Year End Salary & Contract Letters → Print Information Summary Listing. After being generated and edited, the contract salary information may be printed or viewed on screen for review and verification. For a screen image please click Print Information Summary Listings.

The print routine uses the same Standard Report Interface as many other reports.

- Select Print Information Summary Listings.
- Select the report criteria using the standard report interface.
- Select how the report should be sorted.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Modify Contract Salary Information

The path to the Modify Contract Salary Information screen is Reports → Year End Report Menu → Year End Salary & Contract Letters → Modify contract Salary Information. For a screen image please click Modify Contract Salary Information.



- Select Modify Contract Salary Information. A listing of all temporary salary files will be displayed.
- Select the desired employee.
- Select the UPDATE button.
- Press Tab until the information to be changed is highlighted.
- Enter the new information.
- Click SAVE to lock in the changes.



## Printing Contract Letters

Human Resources provides the ability for a basic contract letter to be generated by the desired employee type. For a screen image please click Printing Contract Letters.

- Select Print Contract Letters.
- Select the report criteria from the standard report interface.
- Enter the salary notice date, effective date, and starting year and press TAB after each.
- Enter the minimum and maximum number of checks per year and press TAB after each.
- Select YES or NO for allowing this option to be printed in the contract letters.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

- 1) Print the report by clicking the print icon  or
- 2) Saving to a file by clicking the save icon  .

## Move Information to Employee Information

The path to the Move Information to Employee Information screen is Reports → Year End Report Menu → Year End Salary & Contract Letters → Move Information to Employee Information. Once the salary information has been entered, reviewed, and verified, it may then be moved into the Earnings Information section.

The process of moving the information will make a copy of the current salary information, clear the information from Earnings Information, move the new salary information onto Earnings Information, and recalculate the employee's daily rate, hourly rate, bi-weekly rate, and account (budget) code breakdowns. For a screen image please click Move Information to Employee Information.

- Select Move Information to Employee Information.
- Select the desired employee types to be moved.
- Enter the date range.
- Click OK to run the routine.

### Human Resources Tips:

**0** After moving the salary information to the Earnings Information section, it is recommended that selected diagnostic reports be run. The Payroll Diagnostic Reports Menu is found under the Payroll Output Reports Menu in PAYROLL MANAGER. The Contract & Rate Report, Supplemental Salary Report, and Account Code Breakdown will provide a diagnostic review of the new salaries.

# Utilities

# Utilities

The utility menu features assorted utilities for the user to manage human resources information.

- Click on Utilities on the Human Resources menu bar to view the drop-down menu displaying the seven sections.

## The drop-down menu

There are seven options on the drop-down menu: Attendance Accrual Utility

Delete Attendance Utility

Fiscal Year Attendance Balance Roll-Over

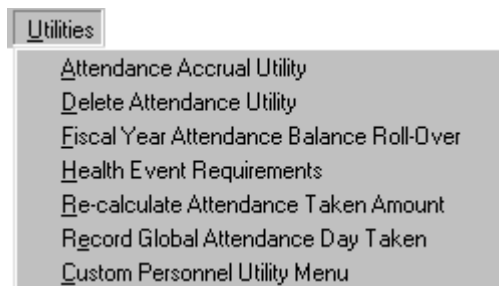
Health Event Requirements

Payment Method

Re-calculate Attendance Taken Amount

Record Global Attendance Day Taken

Custom Personnel Utility Menu.



# Attendance Accrual Utility

The path to the Attendance Accrual Utility screen is Utilities → Attendance Accrual Utility. This section provides the user with the ability to accrue attendance information for the active employees in a selected employee type. The user may accrue sick, vacation, personal, and compensation time for any desired unit. For a screen image please click Attendance Accrual.

- Select Attendance Accrual Utility.
- Select the desired employee type from the list. **HUMAN RESOURCES** provides the user with two search options to locate the employee type:

**Type**                      Activate the TYPE radio button (in the Sort box) and type in the employee type.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the description.

- Enter the amount of units to accrue and if the type should be accrued and press TAB after each.
- Enter the effective accrual date and press TAB.
- Click OK to run the routine.

# Delete Attendance Utility

The path to the Delete Attendance Utility screen is Utilities → Delete Attendance Utility. For a screen image please click Delete Attendance Utility.

- Select Delete Attendance Utility.
- Select the desired employee type(s) from the list.
- Select the desired attendance codes from the list.
- Enter the deletion date.
- Click OK to run the routine.

# Fiscal Year Attendance Balance Roll-Over

The path to the Fiscal Year Attendance Balance Roll-Over screen is Utilities → Fiscal Year Attendance Balance Roll-Over. The Fiscal Year Attendance Balance Roll-Over routine will roll the remaining balance into the employee's available column for sick, personal, vacation, and comp time. For a screen image please click Attendance Balance Roll-Over.

- Select Fiscal Year Attendance Balance Roll-Over.
- Select the desired employee type(s) from the list. Human Resources provides the user with two search options to locate the employee type:

**Type**                      Activate the TYPE radio button (in the Sort box) and type in the employee type.

**Description**                      Activate the DESCRIPTION radio button (in the Sort box) and type in the description.

- Enter the new fiscal year date and press TAB.
- Enter the date range of the previous fiscal year to summarize the roll-over and press TAB.
- If the roll-over accrual should stop at the maximum value for the employee type, click the YES radio button.
- Click OK to run the routine.

# Health Event Requirement

The path to the Health Event Requirement screen is Utilities → Health Event Requirement. For a screen image please click Health Event Requirement.

- Select Health Event Requirement.
- Select the desired employee type(s) from the list. Human Resources provides the user with two search options to locate the employee type:

**Type**                      Activate the TYPE radio button (in the Sort box) and type in the employee type.

**Description**            Activate the DESCRIPTION radio button (in the Sort box) and type in the description.

- Enter the health event and press TAB. Click the magnifying glass button to view a list of health event types. Select an event and click OK.
- If the event is required, click the YES radio button and press TAB.
- Enter the next due date and press TAB.
- Enter any comments or instructions and press TAB
- If all employees of the type(s) chosen are to have the next due date updated, click the YES radio button and press TAB.
- Click OK to run the routine.



# Payment Method

The path to the Payment Method screen is Utilities → Payment Method. For a screen image please click Payment Method.

## Adding a Payment Method

- Click the ADD button from the Update Panel.
- Enter the payment method code and press TAB.
- Enter the description.
- Click SAVE to lock in the new information.

## Finding an Existing Payment Method

**HUMAN RESOURCES** provides the user with two search options:

**Code**                      Activate the CODE radio button (in the SORT box) and type in the code.

**Description**            Activate the DESCRIPTION radio button (in the SORT box) and type in the description.

## Editing the Payment Method

- Select the Pay Method Code.
- Click the UPDATE button from the Update Panel.
- Press Tab until the information to be changed is highlighted.
- Enter the new information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## Deleting the Payment Method

- Select the payment method.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this pay method code?"
- Click YES to delete or NO to keep the code.

### **To exit the Payment Method**

- Click the Exit button on the Update Panel to return to the **HUMAN RESOURCES** main screen.

# Assignment Method

The path to the Payment Method screen is Utilities → Assignment Method. For a screen image please click Assignment Method.

## Adding an Assignment Method

- Click the ADD button.
- Enter the assignment type and press Tab.
- Enter the description for the assignment type and click SAVE to save the new information.

## Updating/Changing an Assignment Method

- Select the Assignment Type.
- Click the UPDATE button from the Update Panel.
- Press Tab until the information to be changed is highlighted.
- Enter the new information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## Deleting the Assignment Method

- Select the Assignment Type.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this assignment method type?"
- Click YES to delete or NO to keep the assignment type.

## To exit the Assignment Method

- Click the Exit button on the Update Panel to return to the **HUMAN RESOURCES** main screen.

# Cobra Utility

The path to the Payment Method screen is Utilities → Assignment Method. For a screen image please click Cobra Utility.

## Adding a Cobra Entry

- Click the ADD button.
- Enter the Code and press Tab.
- Enter the description for the Code and click SAVE to save the new information.

## Updating/Changing a Cobra Entry

- Select the Code.
- Click the UPDATE button from the Update Panel.
- Press Tab until the information to be changed is highlighted.
- Enter the new information and click SAVE. **HUMAN RESOURCES** will automatically replace the old data with the new data.
- Click SAVE to lock in the changes.

## Deleting the Cobra Entry

- Select the Code.
- Click the DELETE button. **HUMAN RESOURCES** will ask, "Delete this record?"
- Click YES to delete or NO to keep the assignment type.

## To exit the Cobra Entry

- Click the Exit button on the Update Panel to return to the **HUMAN RESOURCES** main screen.

# Re-Calculate Attendance Taken Amounts

The path to the Re-Calculate Attendance Taken Amounts screen is Utilities → Re-Calculate Attendance Taken Amounts. The Re-Calculate Attendance Taken Amounts routine will recalculate an employee's sick, personal, vacation, and comp time taken. For a screen image please click Re-Calculate Attendance Taken Amounts.

- Select Re-Calculate Attendance Taken Amounts.
- Click the radio button for the desired date range.
- Click OK to run the routine.

# Record Global Attendance

The path to the Record Global Attendance screen is Utilities → Record Global Attendance. **HUMAN RESOURCES** provides the ability to record an attendance taken record for the active employees in a selected employee type. For a screen image please click Record Global Attendance.

- Select the desired employee type from the list.
- Select the desired attendance code from the list.
- Enter the amount of units taken and press TAB.
- Enter the effective attendance date and press TAB.
- Click OK to run the routine.

# Global Benefit Utility

The Global Benefit Utility function is accessed by selecting the Global Benefit Utility option from the Utilities drop-down menu. For a screen image please click Global Benefit Utility.

The Global Benefit Utility function allows you to search the Payroll and Personnel files for employees who meet specified criteria and are eligible for a benefit coverage change. The system looks for employee records having a specific deduction code and coverage type and then calculates and updates “across-the-board” changes in benefit coverage based on the employee type(s) and provider selected.

## To Perform a Global Benefit Coverage Change:

1. Select one or more employee types from the browser by clicking on the appropriate code. Each type selected is highlighted. (**NOTE:** To deselect a code, click on the code in the browser to remove the highlight.)

OR

If the benefit change should affect all employee types, click the **Select All Employee Types** box to flag the field with a check (✓).

2. Click the magnifying glass to display the Insurance Provider Lookup window. Highlight the desired provider and press OK. The system returns the window being processed, having entered the selected provider in the appropriate field.
3. Choose the coverage type to update. You may update Family, Individual, or Spousal coverage by clicking on the appropriate radio button.
4. The Coverage Information defaults to the deduction code, total cost, percentage/dollar indicator, and old employee cost defined in the Benefit Codes Maintenance File. Enter the new total annual coverage cost, percentage or flat dollar amount indicator (% or \$), and new employee cost for the coverage type. Press the **OK** push button.
5. The system prompts you to confirm if you wish to proceed at this point.

Press **Yes** if you wish to continue the Global Benefit Utility update.

Press **No** if you do not wish to perform the Global Benefit Utility update. At this point, you may make changes on the Global Benefit Utility window or exit the function.

The system automatically makes global changes based on those employees who meet the specified criteria. The Employee Benefits window in the HUMAN RESOURCES Employee Information Maintenance Personal folder reflects the new Employee Portion and Total Cost, as well as the adjusted Employer Portion. The revised Total Cost, Employee Cost, and Employer Cost information is also reflected for the benefit in the HUMAN RESOURCES Benefit Codes Maintenance function.



# Custom Utility Menu

The Custom Utility Menu allows each user to call upon special custom utilities provided to the user by **FINANCE MANAGER**. For a screen image please click Custom Utilities.

- Select Custom Utility Menu.
- Select the desired utility.
- Click RUN to run the routine.

# Employee Information

**Employee Maintenance**

Employee: 2654

Name: Public, John Q.

SSN: 123-45-6777  Male  Female

Salutation: Mr.

Birth Date: 12/12/1976

Address: 1 Main Street

Address:

City: Anytown

State: NY Zip Code: 12345

Phone: 631-555-1212 Ext: Private:

Marital Status: Single

Employment Status: Active

Hire Date: 09/01/1999

Term Reason: <None>

Term Date: / /

Rehire Date: / /

Emp Type: TCH24

Building: K

Department:

Ethnicity: White (Not Hispanic)

Next Prev First Last Save Reset Add Delete Cancel Notes Exit

Press to Lookup Employee Types.

# Calendar Information

The screenshot displays the 'Employee Maintenance' application window. At the top, there are tabs for 'Employee', 'Information', 'Attend', 'Personal', and 'Profession'. The 'Attend' tab is currently selected. Below the tabs, the employee's details are shown: 'Employee: 1546 ABBENANTE, MAUREEN M 036-30-7391'. There is an 'Employee Type:' field with a search icon. To the right, a calendar for 'SEPTEMBER 1999' is displayed, showing days from Sunday to Saturday. Below the calendar is a table with the following columns: 'Absent Code', 'Accrued Amount', 'Annual Amount', 'Units Taken', and 'Available'. The table is currently empty. At the bottom of the window, there are two buttons: 'Attendance' and 'Calendar'.

Absent Code	Accrued Amount	Annual Amount	Units Taken	Available

# Attendance

The screenshot shows the 'Employee Maintenance' application window. It features a tabbed interface with 'Attend' selected. On the left, a table displays attendance records. On the right, a form shows details for employee 1546, including their type (AIDEH), building (NHS), date (09/08/99), units (1.000), code (B), and type (Unit Taken). The interface includes navigation buttons at the bottom and a footer instruction.

Absent Dt	Code	Unit	Reason
09/08/99	B	1.000	
08/23/99	S	5.000	ACCRUAL EARNED

Employee: 1546  
Emp Type: AIDEH Building: NHS  
Date: 09/08/99 Units: 1.000  
Code: B SCHOOL BUSINESS  
Type: Unit Taken \* TAKEN \*  
Reason:  
Substitute: 0

Buttons: First, Prev, Next, Last, Attendance, Calendar, Update, Reset, Add, Delete, Cancel

Select with Mouse or Use Up/Down Keys.

# Benefit Information

**Employee Maintenance**

Employee Information Attend Personal Profession

Benefits

Dependents

Health

Health Notes

Retirement

Emergency

Employee Benefits							
Ins Type	Provider	Cover Type	Employee Portion	Employer Portion	Total Cost	Start Date	End Date
Health	US Health Care	Family	50.00	50.00	100.00		

Employee: 2654 Public, John Q. Emp Type: TCH24

Provider: US Health Care  Health Type: Family Date Range: / / - / /

Employee Portion: 50.00 Employer Portion: 50.00 Total Cost: 100.00 Face Value: 0.00

Next Prev End Last Save Reset Add Delete Cancel Notes Exit

Press to Lookup Insurance Providers.

# Dependents

The screenshot shows the 'Employee Maintenance' application window. The 'Dependents' tab is selected in the top navigation bar. On the left, a vertical menu contains buttons for 'Benefits', 'Dependents', 'Health', 'Health Notes', 'Retirement', and 'Emergency'. The main area displays a table titled 'Employee Dependents' with the following data:

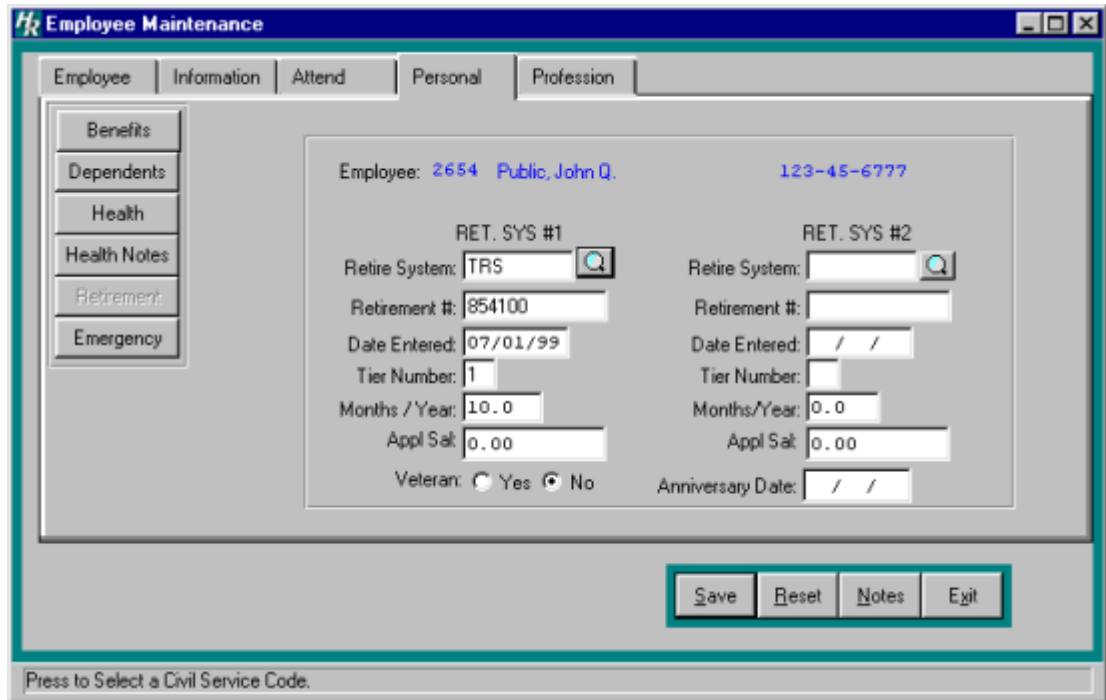
Relationship	Name	DOB	SSN #
Spouse	Jane Q. Public	10/10/65	987-65-4321

Below the table, the employee information is displayed: 2654 Public, John Q. 123-45-6777. The form below contains the following fields:

- Code: A
- Cobra Start Date: 06/30/00
- Cobra End Date: 07/01/99
- Relationship: Spouse
- Name: Jane Q. Public
- DOB: 10/10/65
- SSN: 987-65-4321

At the bottom right, there is a row of buttons: Save, Reset, Add, Delete, Notes, and Cancel. A status bar at the bottom left reads 'Press to lookup Cobra Codes.'

# Retirement Information



Employee Maintenance

Employee: 2654 Public, John Q. 123-45-6777

RET. SYS #1

Retire System: TRS

Retirement #: 854100

Date Entered: 07/01/99

Tier Number: 1

Months / Year: 10.0

Appl Sat: 0.00

Veteran:  Yes  No

RET. SYS #2

Retire System:

Retirement #:

Date Entered: / /

Tier Number:

Months/Year: 0.0

Appl Sat: 0.00

Anniversay Date: / /

Save Reset Notes Exit

Press to Select a Civil Service Code.

# Health

Employee Maintenance

Employee Information Attend Personal Profession

Benefits  
Dependents  
Health  
Health Notes  
Retirement  
Emergency

Employee Health					
Employee	Health Event	Last One	Next Due	Req	Instructions
	Physical		11/23/1999	no	Required

2654 Public, John Q. 123-45-6777

Health Event: Physical Last Occured: / /

Required: no Next One Due: 11/23/1999

Instructions: Required Active:  Yes  No

Save Reset Notes Exit



# Health Notes

The screenshot shows a software window titled "Employee Maintenance" with a menu bar containing "Employee", "Information", "Attend", "Personal", and "Profession". On the left side, there is a vertical list of buttons: "Benefits", "Dependents", "Health", "Health Notes", "Retirement", and "Emergency". The "Health Notes" button is highlighted. The main area displays a table with three columns: "Health Note", "As of Date", and "Permanent". The first row contains the text "Allergic to penicillin", an empty date field, and the value "yes". Below the table, the employee's ID "2654" and name "Public, John Q." are shown. There are three input fields: "Health Note:" with the value "Allergic to penicillin", "Date Occured:" with a date format of "/ /", and "Permanent:" with the value "yes". At the bottom right, there is a row of buttons: "Save", "Reset", "Add", "Delete", "Notes", and "Cancel". The "Save" button is highlighted with a red box. At the bottom left, the text "Press to Save Record." is displayed.

Health Note	As of Date	Permanent
Allergic to penicillin		yes

2654 Public, John Q.

Health Note: Allergic to penicillin

Date Occured: / /

Permanent: yes

Save Reset Add Delete Notes Cancel

Press to Save Record.

# Emergency Contact

The screenshot shows a software window titled "Employee Maintenance" with a menu bar containing "Employee", "Information", "Attend", "Personal", and "Profession". On the left side, there is a vertical list of buttons: "Benefits", "Dependents", "Health", "Health Notes", "Retirement", and "Emergency". The main area features a table with the following data:

Employee	Emergency Contact	Relationship	Emergency Phone
2654	Jane Q. Public	Spouse	631-555-2222

Below the table, the employee ID "2654" and name "Public, John Q." are displayed. A red heading reads "\*\*\* EMERGENCY CONTACT INFORMATION \*\*\*". Below this, the following fields are shown:

Name: Jane Q. Public  
Relationship: Spouse  
Phone: 631-555-2222

At the bottom right, there is a row of buttons: "Save", "Reset", "Add", "Delete", "Notes", and "Cancel". At the bottom left, the text "Press to Save Record." is visible.

# Evaluation

Employee Maintenance

Employee Information Attend Personal Profession

NUMBER OF EVALUATIONS: 1

Eval Date	Type	Next Eval
12/15/99	6month	05/15/00

Employee: 2654 Public, John Q.  
LAST EVALUATION

Eval Date: 12/15/99  
Type: 6month 6th Month observation  
Evaluator: 2654 Public, John Q.  
Next Date: 05/15/00  
Next Type: 1Year 1 Year Evaluation

Notes:

Next Prev End Last Save Reset Add Delete Cancel Notes Exit

Press to Lookup Evaluation Types.

# Education

**Employee Maintenance**

Employee Information Attend Personal Profession

Completed	Type	Course Description	Gr
06/30/99	G	Curriculum	A

Employee: 2654 Public, John Q.

Description: Curriculum Design

Provider: N.Y. Institute of Tech

Date: 06/30/99 Credits: 3.00

Course Type: Graduate Grade:

Apply to Level: yes Level: 1

**CREDIT TOTALS**

Courses: 1 Included: 3.00

Credits: 3.00 Excluded: 0.00

Pending: 0.00

**LAST COURSE TAKEN**

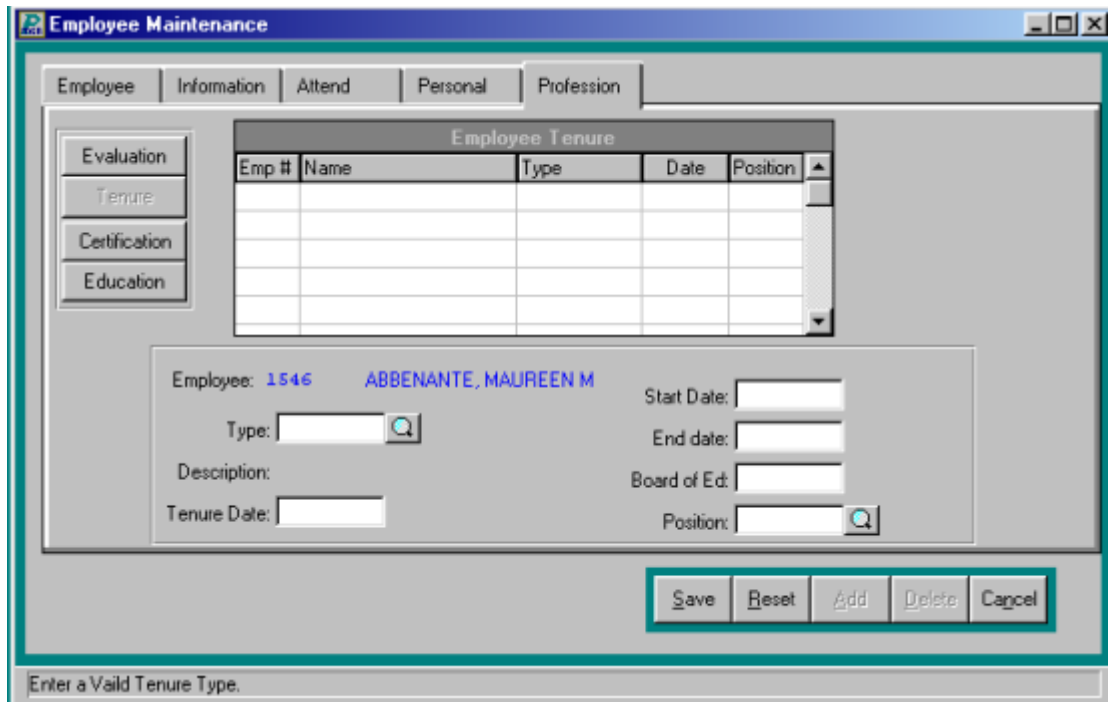
Description: Curriculum Design Type: GRADUATE

Provider: N.Y. Institute of Tech Date: 06/30/99

Credits: 3.00 Grade: A Status: yes

Press to lookup Salary Levels.


# Tenure



The screenshot shows a software window titled "Employee Maintenance" with a tabbed interface. The "Profession" tab is active. On the left, a vertical menu contains "Evaluation", "Tenure", "Certification", and "Education". The main area features a table titled "Employee Tenure" with columns for "Emp #", "Name", "Type", "Date", and "Position". Below the table is a form for adding or editing a tenure record for employee 1546, MAUREEN M. ABBENANTE. The form includes fields for "Type", "Start Date", "End date", "Description", "Board of Ed", "Tenure Date", and "Position". A "Save" button is highlighted in red. A status bar at the bottom displays the message "Enter a Valid Tenure Type."

Emp #	Name	Type	Date	Position

Employee: 1546 ABBENANTE, MAUREEN M

Type:  


Description:

Tenure Date:

Start Date:

End date:

Board of Ed:

Position:  

**Save** Reset Add Delete Cancel

Enter a Valid Tenure Type.

# Certification

The screenshot shows the 'Employee Maintenance' application window. The 'Profession' tab is active. On the left, a vertical menu has 'Certification' selected. The main area contains a table titled 'Employee Certification' with the following data:

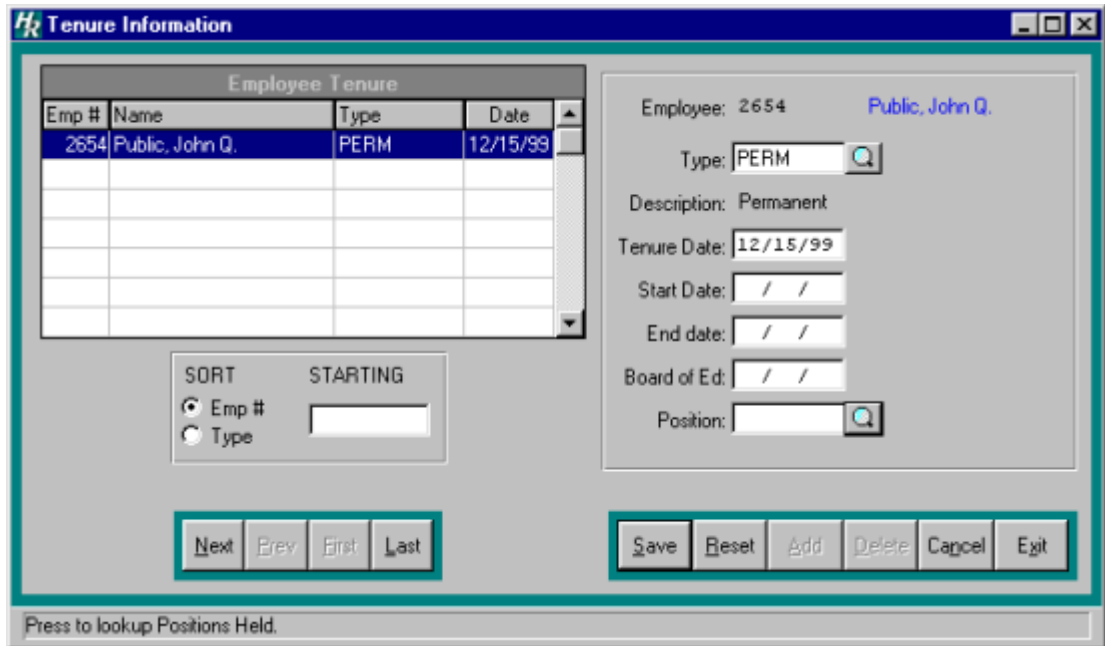
Date	End Date	Type	Description
06/30/95		1180	

To the right of the table is a form for editing the selected certification. It displays the following information:

- Employee ID: 2654
- Phone Number: 123-45-6777
- Name: Public, John Q.
- Type: 1180 (with a search icon)
- Description: (empty)
- Date: 06/30/95
- End Date: / /
- Cert Number: 3952325
- Permanent:  Yes  No

At the bottom of the window, there is a row of buttons: Save, Reset, Add, Delete, Cancel, Notes, and Exit. A status bar at the very bottom reads 'Press to lookup Certification Codes.'

# Tenure Information



Emp #	Name	Type	Date
2654	Public, John Q.	PERM	12/15/99

Employee: 2654      Public, John Q.

Type: PERM

Description: Permanent

Tenure Date: 12/15/99

Start Date: / /

End date: / /

Board of Ed: / /

Position:

SORT      STARTING

Emp #     

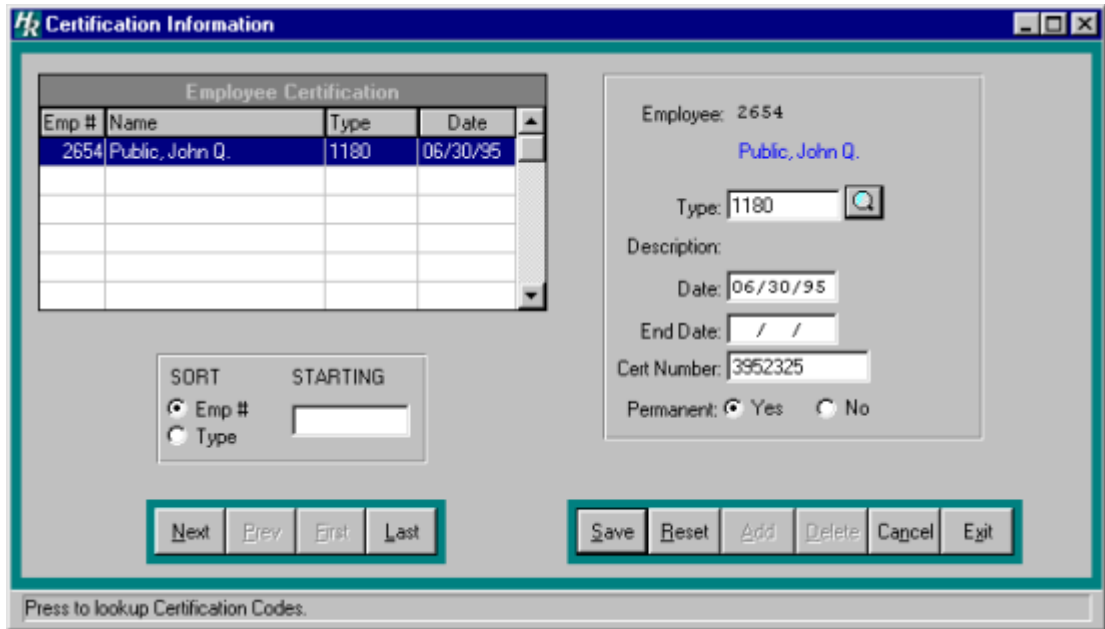
Type

Next   Prev   First   Last

Save   Reset   Add   Delete   Cancel   Exit

Press to lookup Positions Held.

# Certification Information



Emp #	Name	Type	Date
2654	Public, John Q.	1180	06/30/95

Employee: 2654  
Public, John Q.

Type: 1180

Description:

Date: 06/30/95

End Date: / /

Cert Number: 3952325

Permanent:  Yes  No

SORT      STARTING

Emp #     

Type

Next   Prev   First   Last

Save   Reset   Add   Delete   Cancel   Exit

Press to lookup Certification Codes.



# Courses Taken

The screenshot shows a software window titled "Courses Taken". It contains a table of "Employee Courses" and a form for entering course details.

Emp #	Name	Institution
2654	Public, John Q.	N.Y. Institute of Tec

**Employee Courses**

Employee: 2654      Public, John Q.

Description: Curriculum Design

Provider: N.Y. Institute of Tech

Date: 06/30/99

Credits: 3.00

Course Type: Graduate

Grade: A

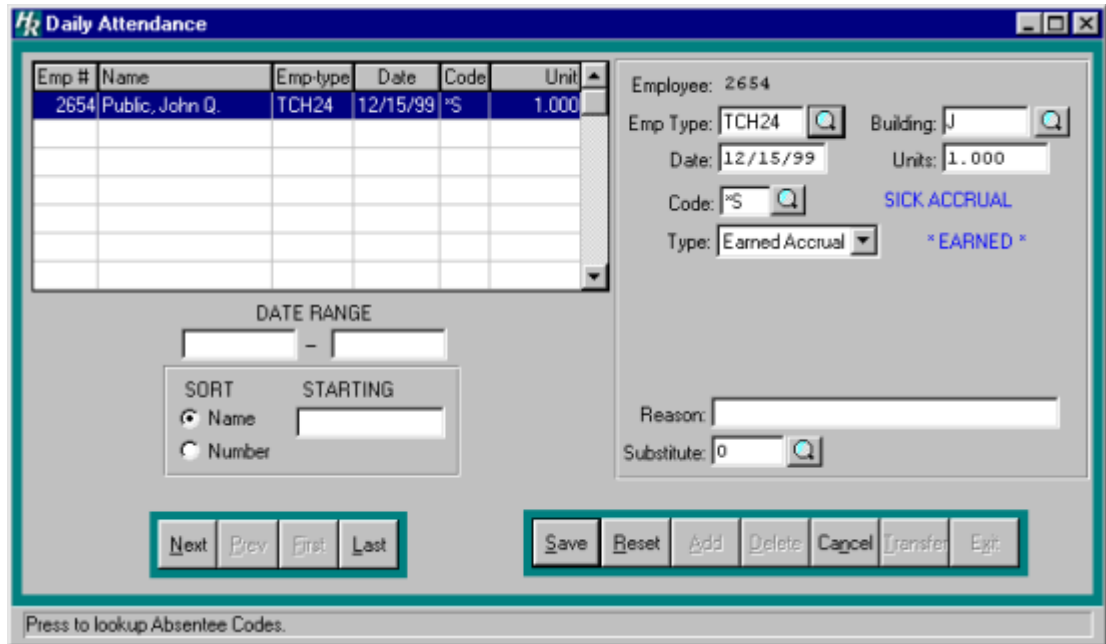
Apply to Level:  Yes    Level: 1   

No

Buttons: Next, Prev, First, Last, Save, Reset, Add, Delete, Cancel, Exit

Press to lookup Salary Levels.

# Daily Attendance



Emp #	Name	Emp-type	Date	Code	Unit
2654	Public, John Q.	TCH24	12/15/99	*S	1.000

Employee: 2654  
Emp Type: TCH24 Building: J  
Date: 12/15/99 Units: 1.000  
Code: \*S SICK ACCRUAL  
Type: Earned Accrual \* EARNED \*

DATE RANGE  
-  
STARTING  
SORT  
 Name  
 Number

Reason:  
Substitute: 0

Next Prev First Last Save Reset Add Delete Cancel Transfer Exit

Press to lookup Absentee Codes.

# Evaluations

The screenshot shows a software window titled "Evaluations" with a blue title bar. The main area is divided into several sections:

- Table:** A table titled "Employee Evaluations" with columns "Emp #", "Name", "Date", and "Type". The first row is highlighted in blue and contains the data: 2654, Public, John Q., 12/15/99, 6month.
- Form Fields:** To the right of the table, there are several input fields:
  - Date: 12/15/99
  - Employee: 2654 (with a search icon) and Public, John Q.
  - Type: 6month (with a search icon) and 6th Month observation
  - Evaluator: 2654 (with a search icon) and Public, John Q.
  - Next Date: 05/15/00
  - Next Type: 1Year (with a search icon) and 1 Year Evaluation
  - Notes: Three empty text input lines.
- Navigation and Action:** Below the table, there are two sections:
  - Sort:** A section with "SORT" and "STARTING" labels, containing radio buttons for "Emp #" (selected) and "Type", and an empty text box.
  - Navigation:** Four buttons labeled "Next", "Prev", "First", and "Last".
  - Action:** A row of six buttons labeled "Save", "Reset", "Add", "Delete", "Cancel", and "Exit".
- Status Bar:** At the bottom, a text box contains the instruction "Enter the date for the evaluation."

# Accumulated Sick Leave Notice

**Accumulated Sick Leave Notice**

Selection Criteria

Select by Emptype:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Attendance Notice Parameters

Fiscal Year to Review:  07/01/99  06/30/00

Upcoming Fiscal Year:  07/01/00  06/30/01

FROM:

RE:  Attendance Balances

DATE:  09/08/99

OK Cancel

Press to lookup emptype.

# Attendance Analysis Reports

**Attendance Analysis Report**

**Selection Criteria**

Select by Employee:

Select by Building:

Select by Department:

**Analysis Types**

**Consecutive** List how many times an employee has been absent for more than 'X' days.

**Weekday** List how many times an employee has been absent on a given weekday.

**Holiday** List employees who were absent a day day before and after a given date.

**Yearly Routine** List employees who are absent a the same time every year.

**Emp Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

**Attendance Sort Criteria**

Sort By Employee:  Type  Name

Beginning Date:  Ending Date:

Attend Code:   Min No. of Consect Days:

# Attendance Detail Report by Employee Type

**Attendance Detail Reports by Employee**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Employee Attendance Sort Criteria

Starting Date:

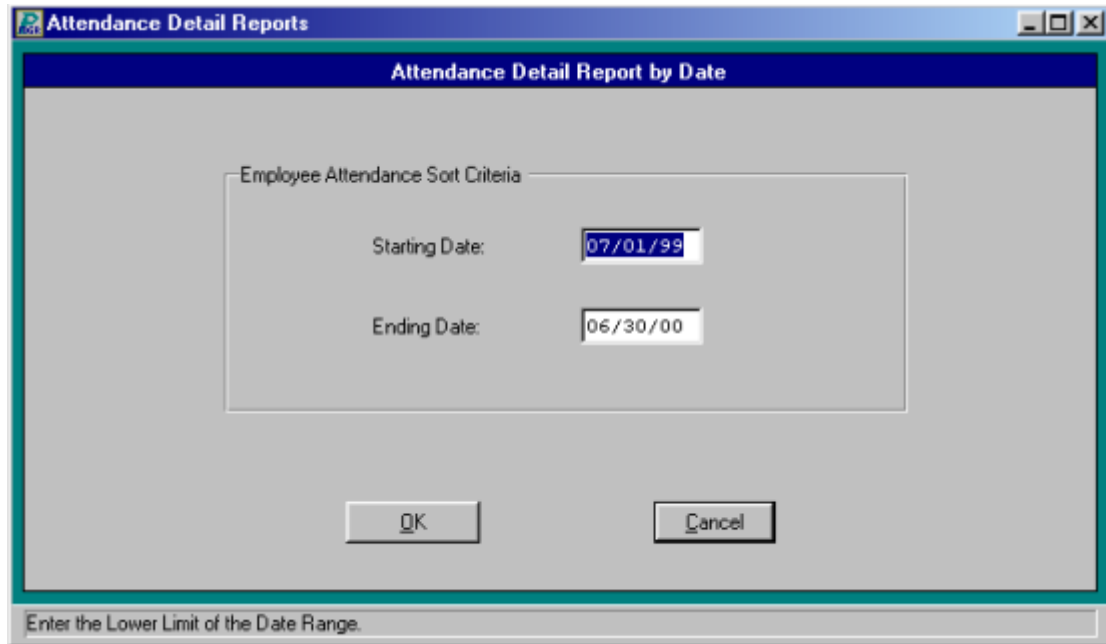
Ending Date:

# Attendance Detail Report by Attendance Code

The screenshot shows a software window titled "Attendance Detail Reports" with a subtitle "Attendance Detail Report by Attendance Code". The window is divided into two main sections. On the left, under "Select Attendance Code", there is a checkbox labeled "Select All Codes" which is currently unchecked. Below this is a table with two columns: "Code" and "Description". The table lists various attendance codes and their corresponding descriptions. On the right, under "Employee Attendance Sort Criteria", there are two date input fields: "Starting Date" with the value "07/01/99" and "Ending Date" with the value "06/30/00". At the bottom of the window, there are two buttons: "OK" and "Cancel". A status bar at the very bottom of the window contains the text "Press to Select All Attendance Codes."

Code	Description
*C	COMP CARRYOVER
*P	PERSONAL CARRYOVER
*S	SICK CARROVER
*V	VACATION CARRYOVER
A	LEAVE WITHOUT PAY
A1	LEAVE WITHOUT PAY - NEA
B	SCHOOL BUSINESS
C	COMP
CN	CONFERENCE/VISITATION
D	DEATH

## Attendance Detail Report by Date



The image shows a software dialog box titled "Attendance Detail Reports" with a subtitle "Attendance Detail Report by Date". Inside the dialog, there is a section titled "Employee Attendance Sort Criteria" containing two date input fields: "Starting Date" with the value "07/01/99" and "Ending Date" with the value "06/30/00". At the bottom of the dialog are "OK" and "Cancel" buttons. A status bar at the very bottom of the window contains the text "Enter the Lower Limit of the Date Range."

Attendance Detail Reports

Attendance Detail Report by Date

Employee Attendance Sort Criteria

Starting Date: 07/01/99

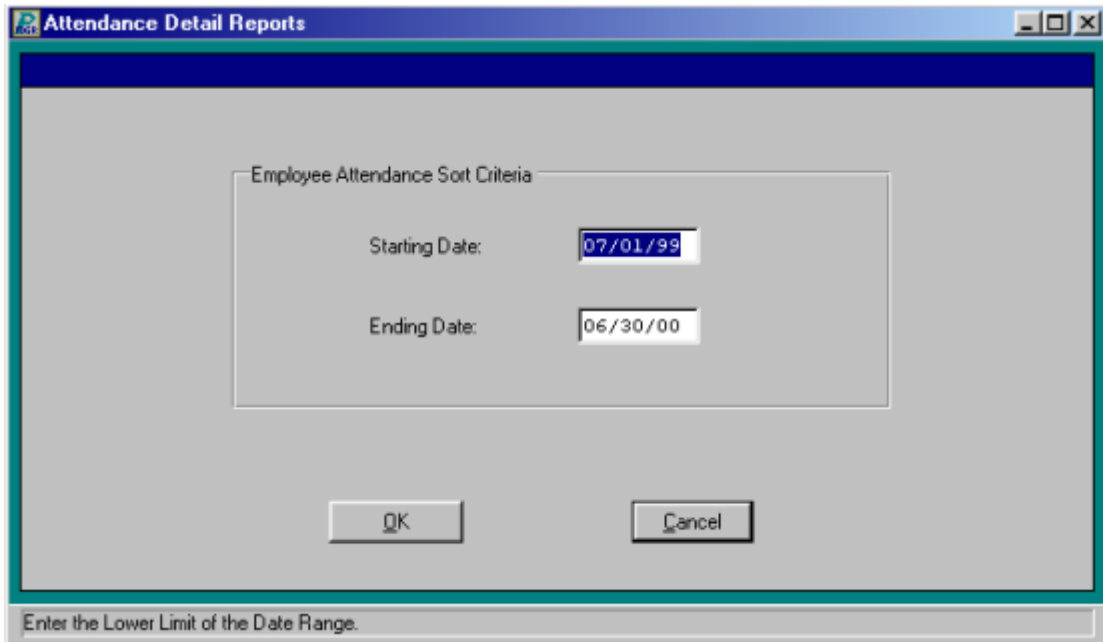
Ending Date: 06/30/00

OK Cancel

Enter the Lower Limit of the Date Range.



# Attendance Detail Report by Name



Attendance Detail Reports

Employee Attendance Sort Criteria

Starting Date: 07/01/99

Ending Date: 06/30/00

OK Cancel

Enter the Lower Limit of the Date Range.

# Attendance Worksheet

**Attendance Worksheet**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Additional Criteria

Date Range:

Worksheet Type:  Blank  Review

# Compensated Absence Listing

Select Employee Type

Select All Types

Type	Description
ADMEN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES
DIREC	DIRECTORS

Compensated Absence Selection Criteria

SICK    PERSONAL    VACATION

Enter the Effective Date:

OK   Cancel

Press to Select All Employee Types.

# Daily Attendance Report

**Daily Attendance Report**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Daily Attendance Report Criteria

Dates:

OK Cancel

# Employee Attendance Report

The screenshot shows a Windows-style dialog box titled "Employee Attendance Record". It contains two main sections: "Employee Selection Criteria" and "Employee Attendance Sort Criteria".

**Selection Criteria**

Select by Employee:  Select by Building:  Select by Department:

**Employee Selection Criteria**

Employee Start Name:   
Employee End Name:

Include Active Employees in Listing:  Yes  No  
Include Inactive Employees in Listing:  No  Yes  
Include Retired Employees in Listing:  No  Yes  
Include On Leave Employees in Listing:  No  Yes  
Include Temporary Employees in Listing:  Yes  No

**Employee Attendance Sort Criteria**

Date Range:

Include Accrued/Earned Days in Report:  Yes  No  
Include Employees with Perfect Attendance:  Yes  No

Buttons:

# Employees with Negative Balances

The image shows a software dialog box titled "Employee with Negative Balance". The dialog box has a blue title bar with standard window controls (minimize, maximize, close) on the right. The main content area is gray and contains the following text and controls:

Employee with Negative Balance

**This report will summarize current employee files and will only display employees with negative available days.**

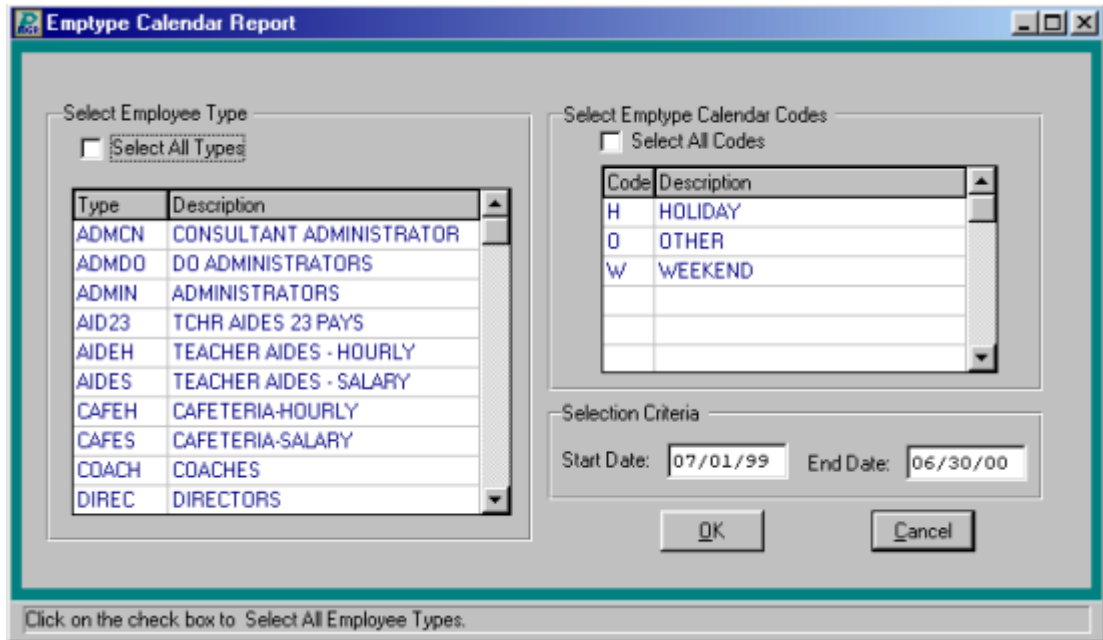
Start Date:  End Date:

Temporary Employees:  Yes  No

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Below the dialog box, there is a small text input field with the label "Enter the Fiscal Year Start date." and a cursor pointing to the right.

# Employee Type Calendar Report



**Employee Calendar Report**

Select Employee Type

Select All Types

Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES
DIREC	DIRECTORS

Select Employee Calendar Codes

Select All Codes

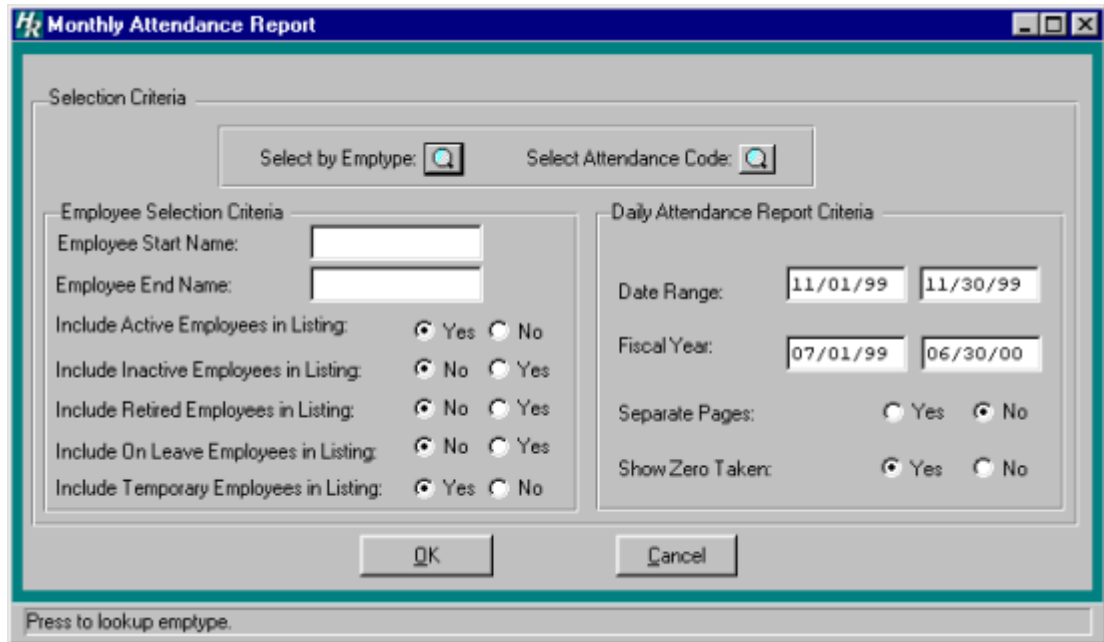
Code	Description
H	HOLIDAY
O	OTHER
W	WEEKEND

Selection Criteria

Start Date:  End Date:

Click on the check box to Select All Employee Types.

# Monthly Attendance Report



**Monthly Attendance Report**

Selection Criteria

Select by Employee:  Select Attendance Code:

**Employee Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

**Daily Attendance Report Criteria**

Date Range:

Fiscal Year:

Separate Pages:  Yes  No

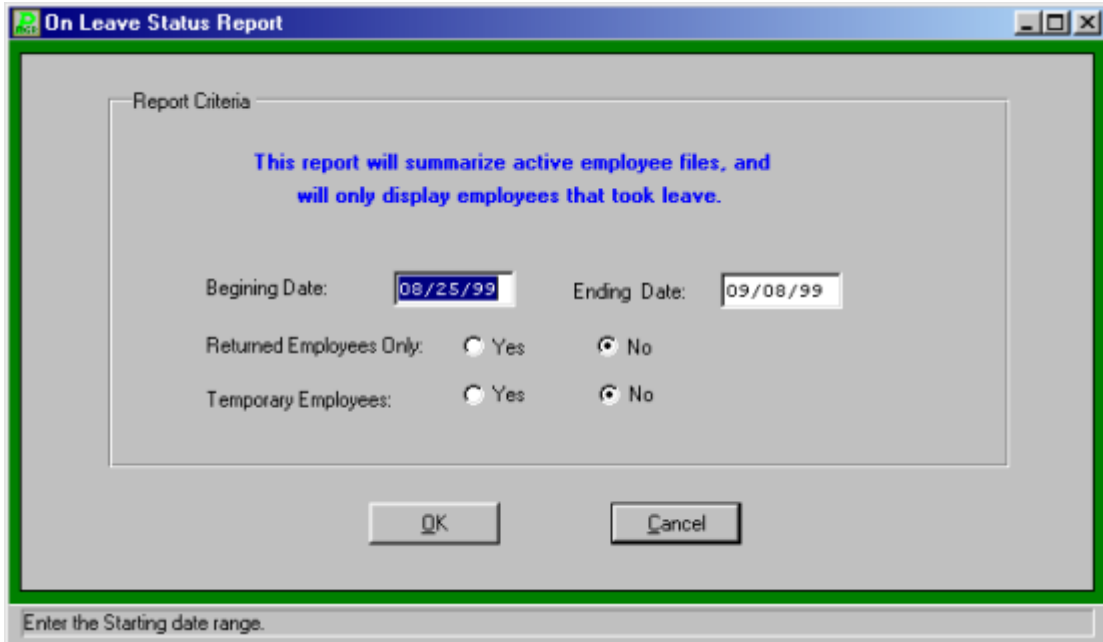
Show Zero Taken:  Yes  No

OK Cancel

Press to lookup employee.



# On Leave Status Report



On Leave Status Report

Report Criteria

**This report will summarize active employee files, and will only display employees that took leave.**

Beginning Date: 08/25/99      Ending Date: 09/08/99

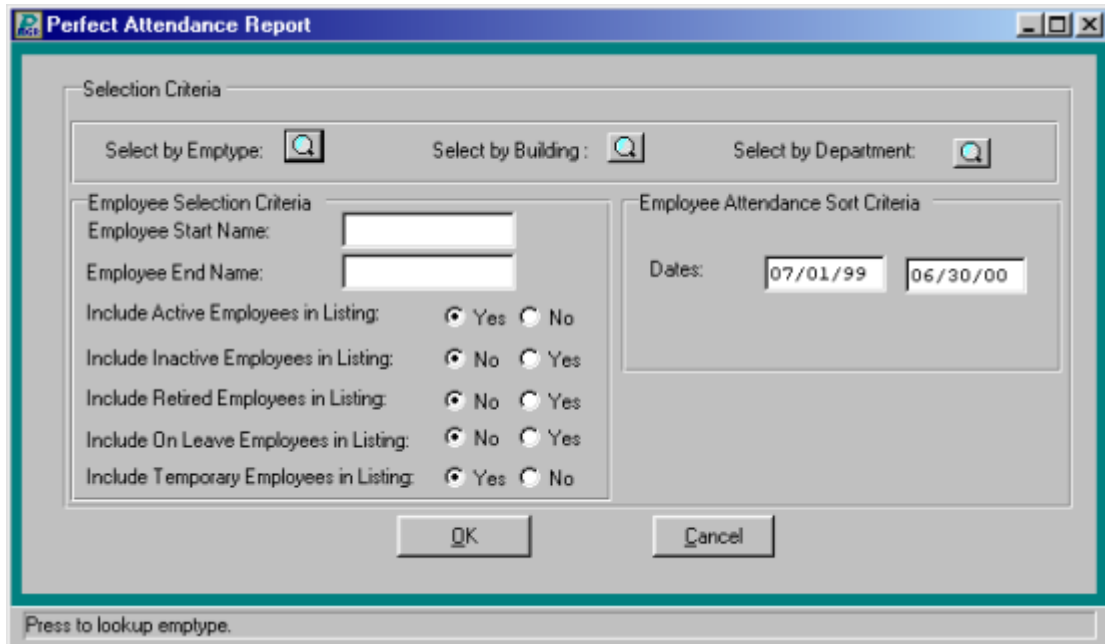
Returned Employees Only:  Yes       No

Temporary Employees:  Yes       No

OK      Cancel

Enter the Starting date range.

# Perfect Attendance Report



Perfect Attendance Report

Selection Criteria

Select by Emptype:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Employee Attendance Sort Criteria

Dates:

OK Cancel

Press to lookup emptype.

# Time Summary Listing

**Time Summary Listing**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Employee Attendance Sort Criteria

Starting Date:

Ending Date:

# Substitute Listing by Name

**Substitute Listings** [By Name]

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Employee Attendance Sort Criteria

Starting Date:

Ending Date:

# Substitute Listing by Building

**Substitute Listings** [By Building]

Selection Criteria

Select by Employee: [Q]      Select by Building: [Q]      Select by Department: [Q]

Employee Selection Criteria

Employee Start Name: [ ]

Employee End Name: [ ]

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

Employee Attendance Sort Criteria

Starting Date: [07/01/99]

Ending Date: [06/30/00]

[OK]      [Cancel]

# Substitute Listing by Date

**Substitute Listings** [By Date]

Selection Criteria

Select by Employee: [Search]      Select by Building: [Search]      Select by Department: [Search]

Employee Selection Criteria

Employee Start Name: [Text Box]

Employee End Name: [Text Box]

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

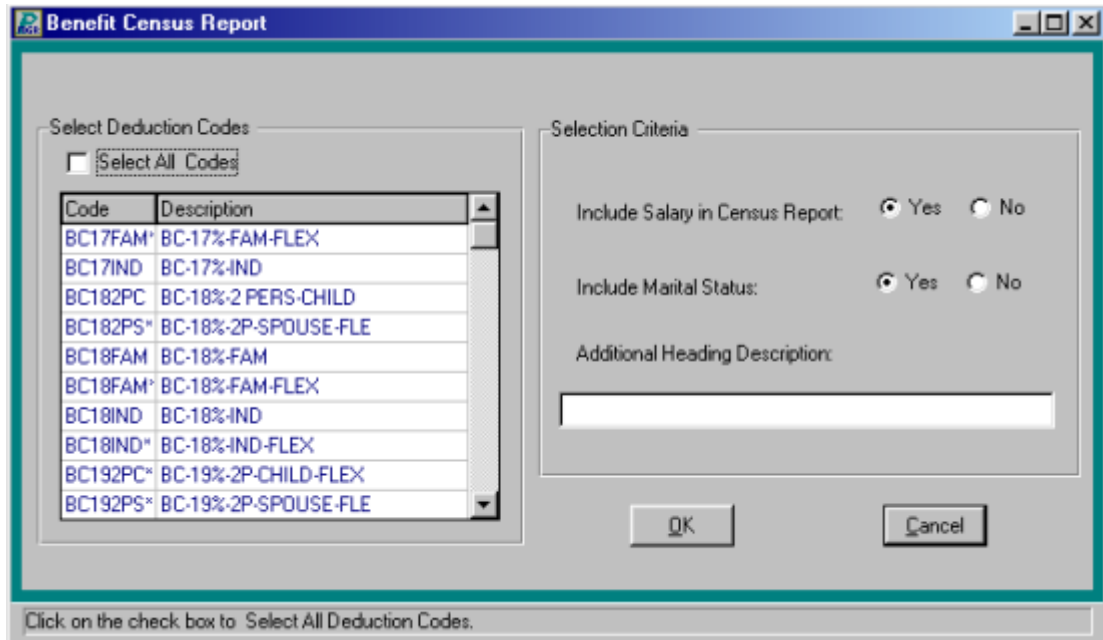
Employee Attendance Sort Criteria

Starting Date: [07/01/99]

Ending Date: [06/30/00]

[OK]      [Cancel]

# Benefit Census Report



**Select Deduction Codes**

Select All Codes

Code	Description
BC17FAM*	BC-17%-FAM-FLEX
BC17IND	BC-17%-IND
BC182PC	BC-18%-2 PERS-CHILD
BC182PS*	BC-18%-2P-SPOUSE-FLE
BC18FAM	BC-18%-FAM
BC18FAM*	BC-18%-FAM-FLEX
BC18IND	BC-18%-IND
BC18IND*	BC-18%-IND-FLEX
BC192PC*	BC-19%-2P-CHILD-FLEX
BC192PS*	BC-19%-2P-SPOUSE-FLE

**Selection Criteria**

Include Salary in Census Report:  Yes  No

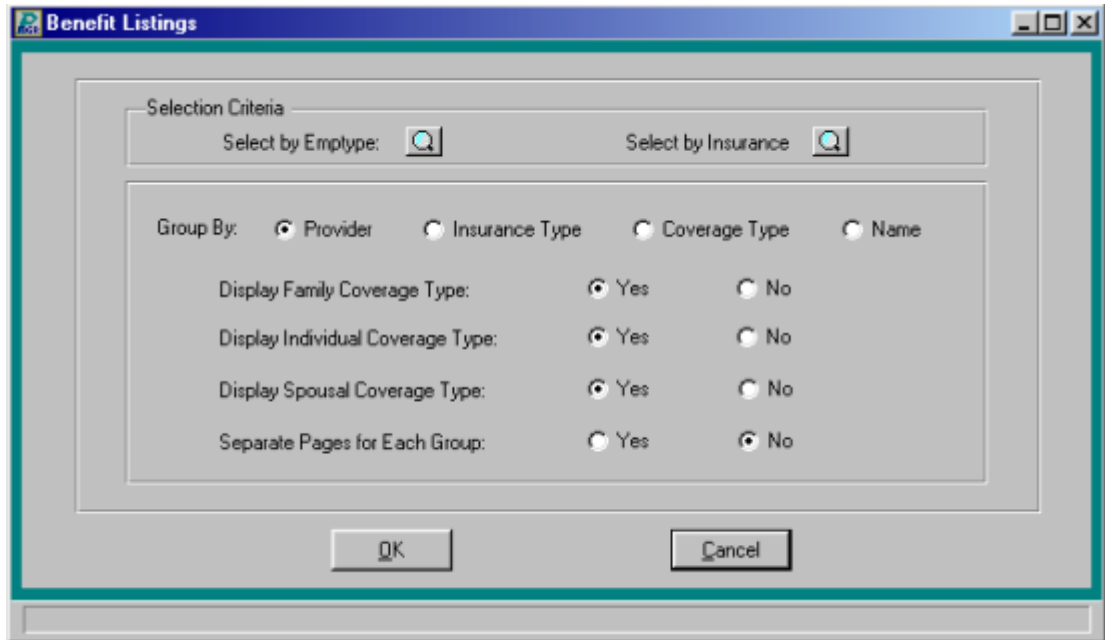
Include Marital Status:  Yes  No

Additional Heading Description:

OK Cancel

Click on the check box to Select All Deduction Codes.

# Benefit Listing



The image shows a software dialog box titled "Benefit Listings". It contains several options for filtering and displaying benefit information. At the top, there are two search fields: "Select by Emptype:" and "Select by Insurance:", each with a magnifying glass icon. Below these is a "Group By:" section with four radio button options: "Provider" (selected), "Insurance Type", "Coverage Type", and "Name". Underneath are four rows of options, each with a label and two radio buttons for "Yes" and "No":  
1. "Display Family Coverage Type:" with "Yes" selected.  
2. "Display Individual Coverage Type:" with "Yes" selected.  
3. "Display Spousal Coverage Type:" with "Yes" selected.  
4. "Separate Pages for Each Group:" with "No" selected.  
At the bottom of the dialog are two buttons: "OK" and "Cancel".



# Employee Benefit Status

Employee Benefit Status

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

Include Temporary Employees in Listing:  Yes  No

OK Cancel

# Expanded Benefit Profile

**Expanded Benefit Profile**

Selection Criteria:

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria:

Employee Start Name:

Employee End Name:

Include Active Employees:  Yes  No

Include Inactive Employees:  Yes  No

Include Retired Employees:  Yes  No

Include On Leave Employees:  Yes  No

Include Temporary Employees:  Yes  No

Salary Notice Selection Criteria:

Date of Salary Notice:

Effective Date:

Starting Year:

Present Salary Payment:  or

Include Salary Payment on Letters:  Yes  No

# Civil Service Report

**Civil Service Report**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  No  Yes

Include Retired Employees in Listing:  No  Yes

Include On Leave Employees in Listing:  No  Yes

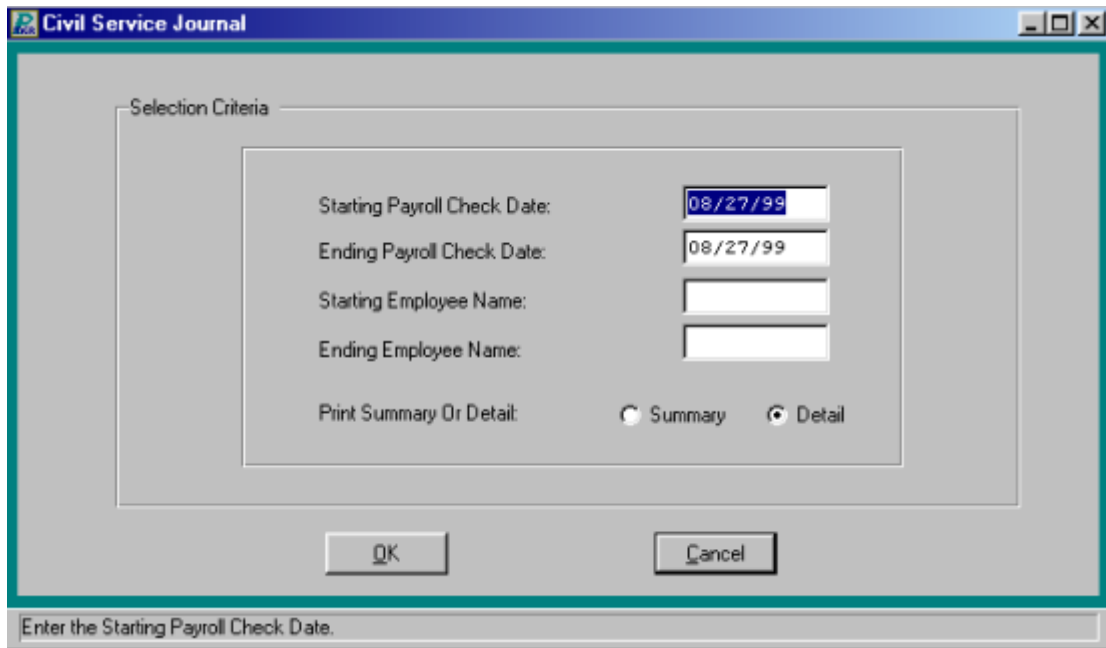
Include Temporary Employees in Listing:  Yes  No

Select Desired Payroll Dates

Desired Payroll Dates:

OK Cancel

# Civil Service Payroll Journal



Civil Service Journal

Selection Criteria

Starting Payroll Check Date: 08/27/99

Ending Payroll Check Date: 08/27/99

Starting Employee Name:

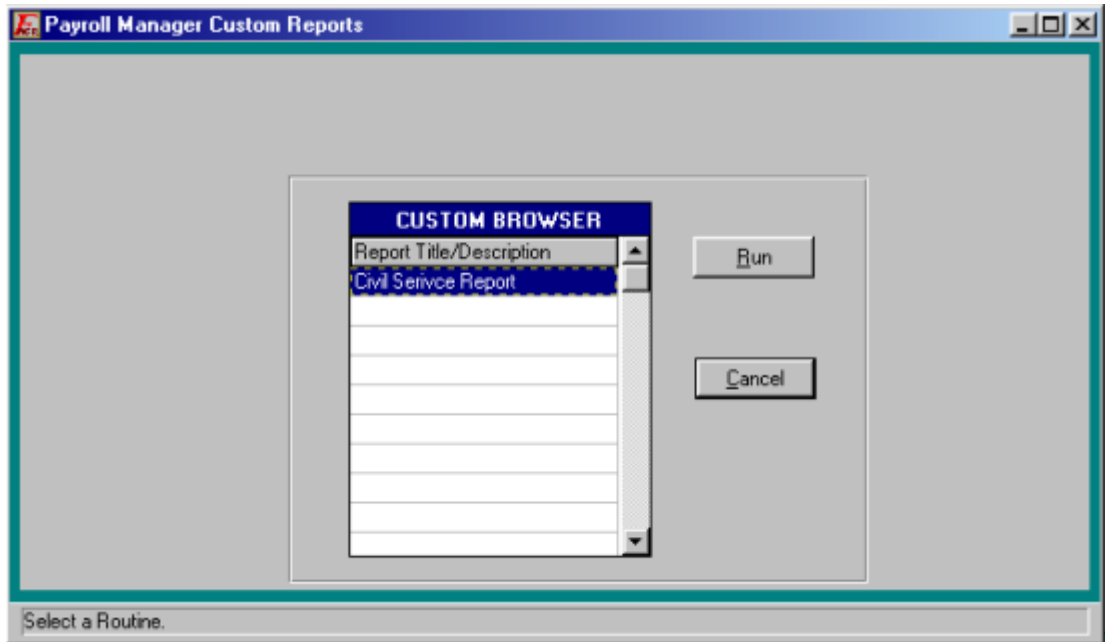
Ending Employee Name:

Print Summary Or Detail:  Summary  Detail

OK Cancel

Enter the Starting Payroll Check Date.

# Custom report Menu



# Approved Courses Pending

Approved Courses Pending

Approved Courses

Report Criteria

Break By Employee:  Yes  No

OK Cancel

Separate pages for each employee?

# Employee Educational Record

Employee Educational Listing

Select by Employee:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Starting Date:

Ending Date:

Group By:  Emp Type  
 Building  
 Department

# Employee Educational Listing

Employee Educational Listing

Select by Employee:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Starting Date:

Ending Date:

Group By:  Emp Type  
 Building  
 Department



# Birthday Listing

**Birthday Listing**

Select by Employee:  Select by Building:  Select by Department:

**Employee Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

**Birthday List Criteria**

Range of Months:  To

Include Known Birthdays:  Yes  No

Include Unknown Birthdays:  Yes  No

Press to lookup emplye.

# Date of Birth Reports

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Birthday Date Range

Start Date:

End Date:

# Certification Listing

**Certification List**

Select by Employee:  Select by Building:  Select by Department:  Select by Certification:

Click on the Button to make Selection for each Criteria

SORT BY:  NAME  CERTIFICATION  DATE RANGE

**Employee Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

**Certification Report Parameters**

Date Range:  -

Break by Certification Type:  Yes  No

Include Permanent Certifications:  Yes  No

Include Provisional Certifications:  Yes  No

OK Cancel

# Employee Directory

The screenshot shows a dialog box titled "Employee Directory Listing". At the top, there are three search fields: "Select by Employee:", "Select by Building:", and "Select by Department:", each with a magnifying glass icon. Below these is a "Sorting Criteria:" section with four radio button options: "NAME" (selected), "BUILDING", "EMPLOYEE TYPE", and "DEPARTMENT". To the right of the sorting criteria is an "Employ" button with a tooltip that says "Click on the Button to make Selection for each Criteria." Below the button are two text input fields: "Employee Start Name:" and "Employee End Name:". At the bottom right, there are five rows of radio button options for including or excluding certain employee types: "Include Active Employees in Listing:", "Include Inactive Employees in Listing:", "Include Retired Employees in Listing:", "Include On Leave Employees in Listing:", and "Include Temporary Employees in Listing:". The last row is "Display Unlisted Phone Numbers:". At the bottom center, there are "OK" and "Cancel" buttons.

Employee Directory Listing

Select by Employee:  Select by Building:  Select by Department:

Sorting Criteria:

- NAME
- BUILDING
- EMPLOYEE TYPE
- DEPARTMENT

Employ Click on the Button to make Selection for each Criteria.

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

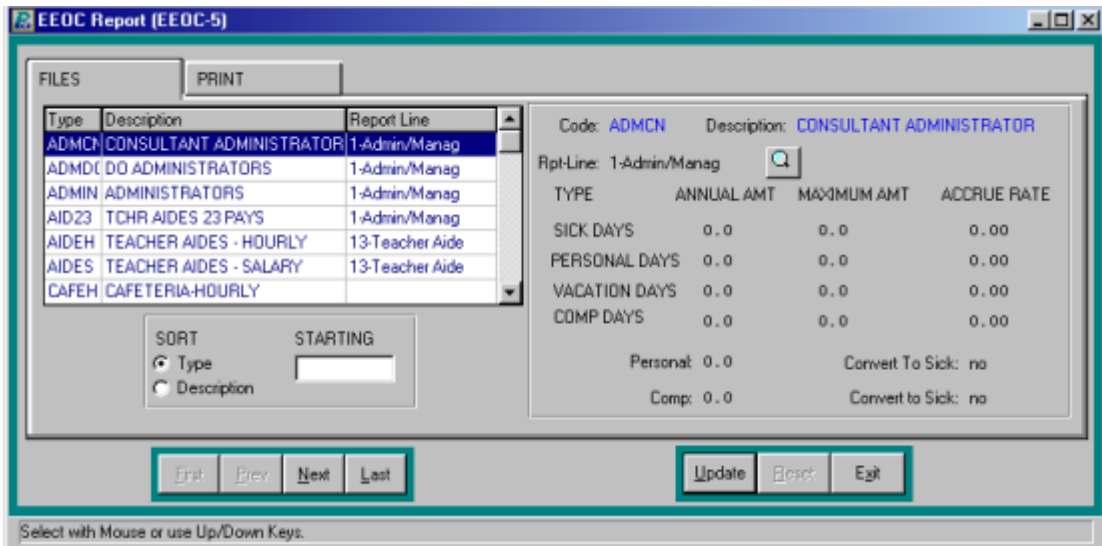
Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

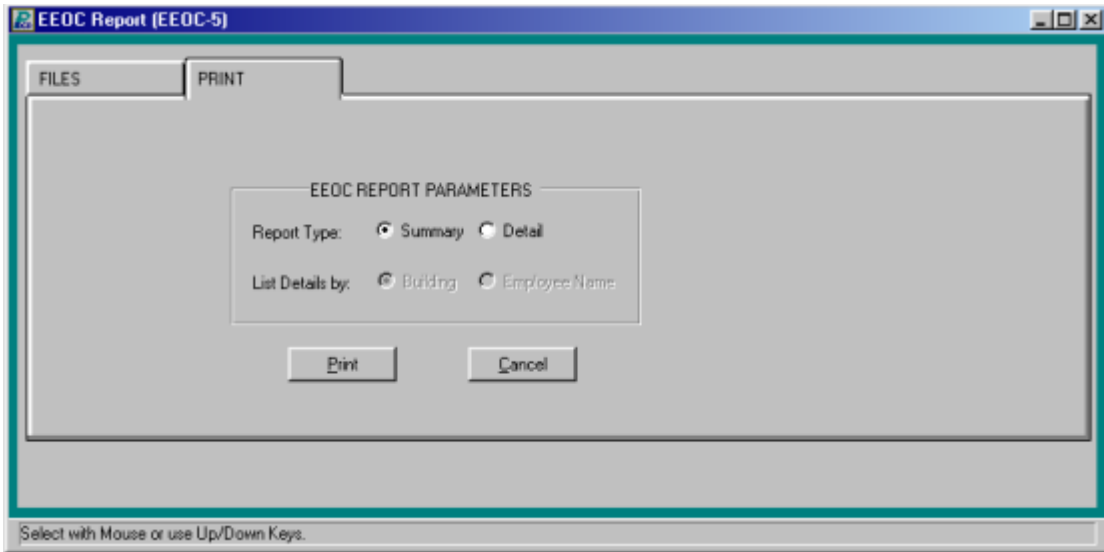
Display Unlisted Phone Numbers:  Yes  No

OK Cancel

# EEOC Report Files Folder



# EEOC Report Print Folder



# Mailing Labels

**Mailing Labels**

Selection Criteria

Select by Employee:     Select by Building:     Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Printer Type:  Dot Matrix (1)     Laser (3)

# Mortality Report

Mortality

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

SORT BY:  NUMBER  NAME  EMPLOYEE TYPE  BUILDING  DEPARTMENT

Employee Start Name:

Employee End Name:

Display Social Security Numbers ?  Yes  No

OK Cancel

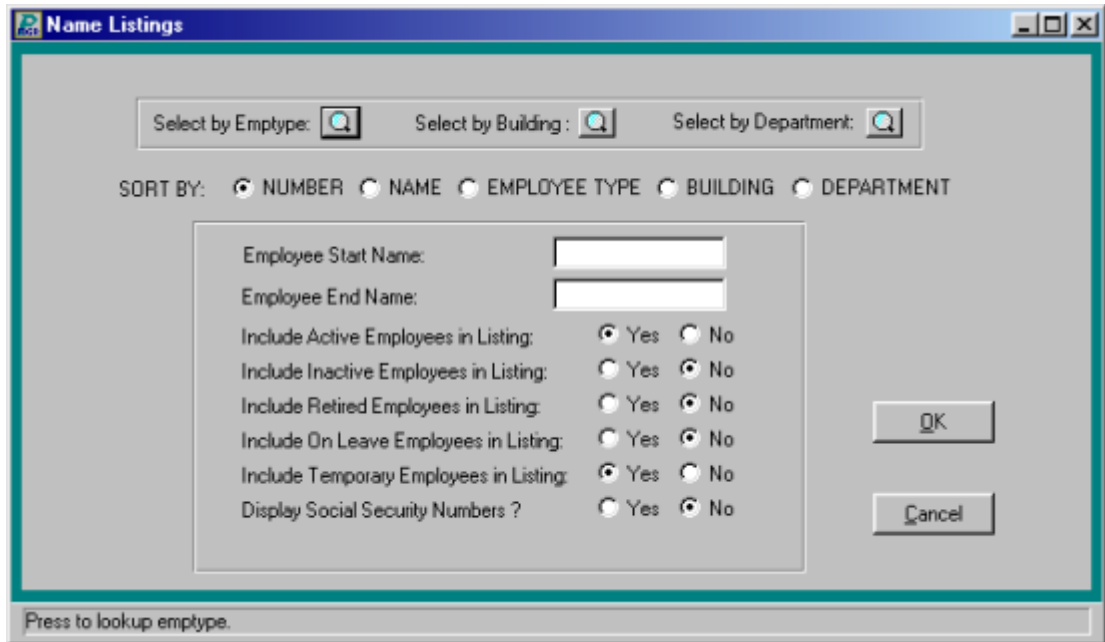


# Name Change

The screenshot shows a 'Name Change' dialog box with the following elements:

- Search filters: 'Select by Employee:', 'Select by Building:', and 'Select by Department:', each with a magnifying glass icon.
- Sorting: 'SORT BY:' with radio buttons for 'DATE' (selected) and 'NAME'.
- Input fields: 'Employee Start Name:' and 'Employee End Name:' with empty text boxes.
- Inclusion checkboxes:
  - 'Include Active Employees in Listing:' with 'Yes' selected.
  - 'Include Inactive Employees in Listing:' with 'No' selected.
  - 'Include Retired Employees in Listing:' with 'No' selected.
  - 'Include On Leave Employees in Listing:' with 'No' selected.
  - 'Include Temporary Employees in Listing:' with 'Yes' selected.
- Buttons: 'OK' and 'Cancel' at the bottom.

# Name Listings



**Name Listings**

Select by Employee:  Select by Building:  Select by Department:

SORT BY:  NUMBER  NAME  EMPLOYEE TYPE  BUILDING  DEPARTMENT

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

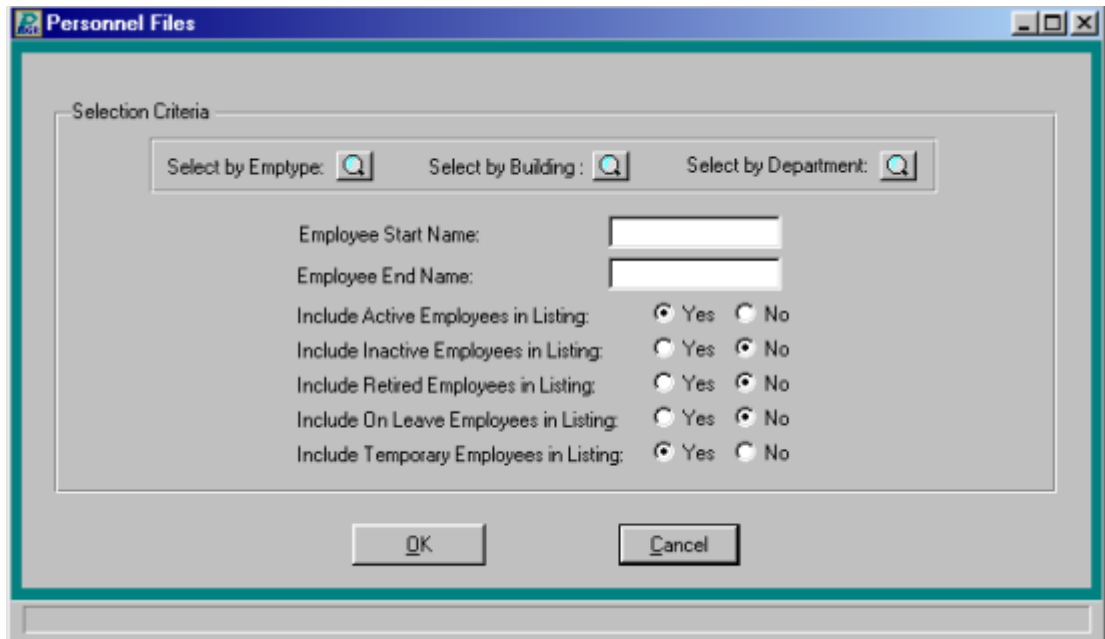
Display Social Security Numbers ?  Yes  No

OK

Cancel

Press to lookup employee.

# Personnel Files



The image shows a software dialog box titled "Personnel Files". It contains a "Selection Criteria" section with three search fields: "Select by Emptype:", "Select by Building:", and "Select by Department:", each with a magnifying glass icon. Below these are two text input fields for "Employee Start Name:" and "Employee End Name:". There are five radio button options for including different employee types in the listing: "Include Active Employees in Listing:", "Include Inactive Employees in Listing:", "Include Retired Employees in Listing:", "Include On Leave Employees in Listing:", and "Include Temporary Employees in Listing:". Each option has "Yes" and "No" radio buttons. At the bottom of the dialog are "OK" and "Cancel" buttons.

Personnel Files

Selection Criteria

Select by Emptype:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

OK Cancel

# R.I.F. Report

Select by Employee:  Select by Building:  Select by Department:

GROUP BY:  DEPARTMENT  CERTIFICATION  EMP TYPE  HIRE DATE  TENURE AREA  NAME

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Sorting Criteria

Starting Date of Search:

Ending Date of Search:

Seniority as of:

Break by Group:  Yes  No

Lay-Off Temps:  Yes  No

Include Error Report:  Yes  No

Use Position Codes:  Yes  No

All Jarema Credit:  Yes  No

OK Cancel

# Seniority Reports

Seniority Report

Select by Employee:  Select by Building:  Select by Department:

GROUP BY:  DEPARTMENT  CERTIFICATION  EMP TYPE  HIRE DATE  TENURE AREA  NAME

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Sorting Criteria

Starting Date of Search:

Ending Date of Search:

Seniority as of:

Break by Group:  Yes  No

Include Error Report:  Yes  No

Use Position Codes:  Yes  No

All Jarema Credit:  Yes  No

# Tenure Listing

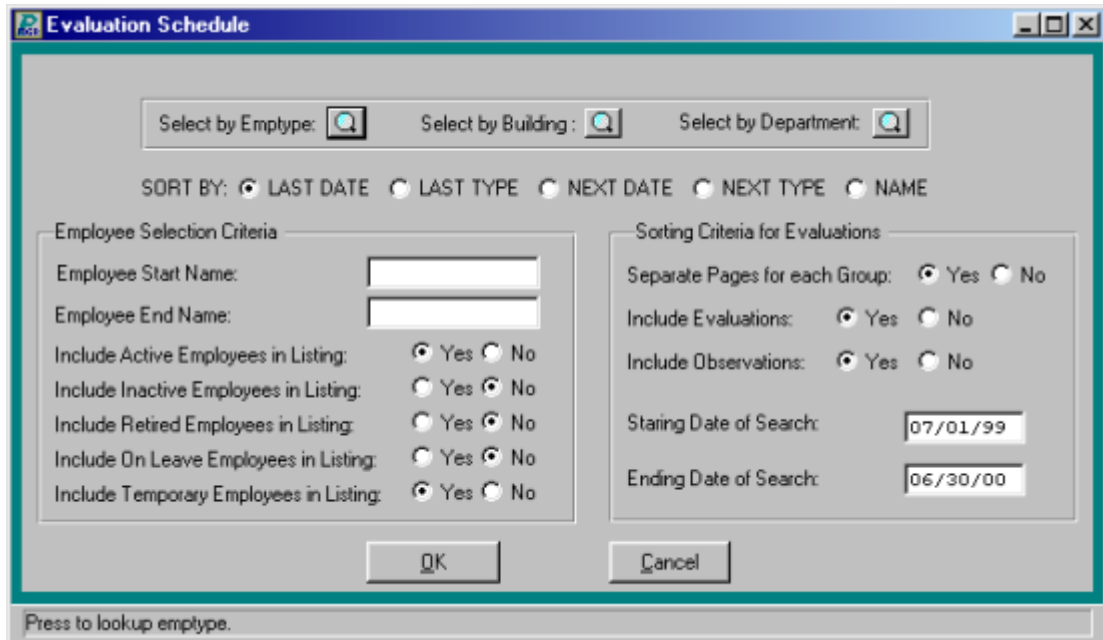
The screenshot shows a software window titled "Tenure Listings". At the top, there are four search fields: "Select by Employee:", "Select by Building:", "Select by Department:", and "Select by Tenure:", each with a magnifying glass icon. Below these is a "GROUP BY:" section with four radio buttons: "NAME" (selected), "TENURE AREA", "TENURE DATE", and "LOCATION".

The window is divided into two main sections:

- Employee Selection Criteria:**
  - Employee Start Name: [Empty text box]
  - Employee End Name: [Empty text box]
  - Include Active Employees in Listing:  Yes  No
  - Include Inactive Employees in Listing:  Yes  No
  - Include Retired Employees in Listing:  Yes  No
  - Include On Leave Employees in Listing:  Yes  No
  - Include Temporary Employees in Listing:  Yes  No
- Tenure Report Parameters:**
  - Date Range: [09/01/58] - [06/30/00]
  - Tenure Effective Date: [09/08/99]
  - Page Break by Tenure Type:  Yes  No
  - Include Probationary Employees:  Yes  No
  - Include Permanent Tenure:  Yes  No

At the bottom of the window are two buttons: "OK" and "Cancel". A status bar at the very bottom contains the text "Press to lookup emp type."

# Evaluation Schedule



**Evaluation Schedule**

Select by Employee:  Select by Building:  Select by Department:

SORT BY:  LAST DATE  LAST TYPE  NEXT DATE  NEXT TYPE  NAME

**Employee Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

**Sorting Criteria for Evaluations**

Separate Pages for each Group:  Yes  No

Include Evaluations:  Yes  No

Include Observations:  Yes  No

Staring Date of Search:

Ending Date of Search:

Press to lookup emplyte.

# Completes Evaluations

Completed Evaluations

Select by Emptype:  Select by Building:  Select by Department:

SORT BY:  EVALUATOR  LAST DATE  LAST TYPE  NAME

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Sorting Criteria for Evaluations

Separate Pages for each Group:  Yes  No

Starting Date of Search:

Ending Date of Search:

Include Evaluations:  Yes  No

Include Observations:  Yes  No

OK Cancel



# Pending Evaluations

Pending Evaluations

Select by Employee: [Q]    Select by Building: [Q]    Select by Department: [Q]

SORT BY:  NEXT DATE     NEXT TYPE     EVALUATOR     NAME

Employee Selection Criteria

Employee Start Name: [ ]

Employee End Name: [ ]

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Sorting Criteria for Evaluations

Separate Pages By Group:  Yes  No

Show All Employees:  Yes  No

Include Evaluations:  Yes  No

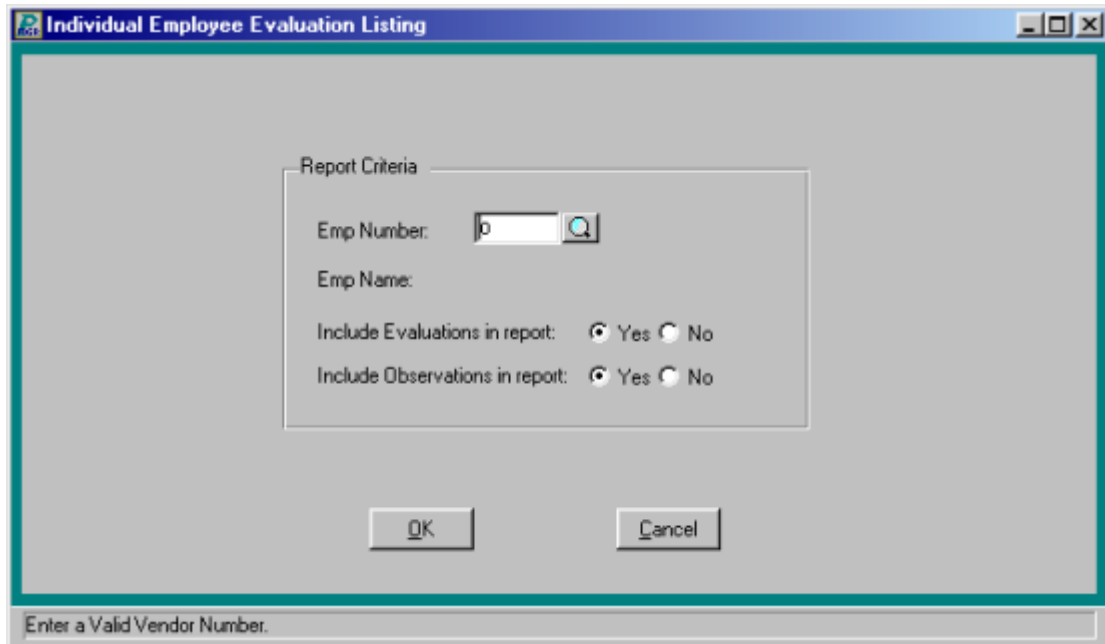
Include Observations:  Yes  No

Starting Date of Search: [07/01/99]

Ending Date of Search: [06/30/00]


OK    Cancel

# Employee Evaluation Listing



Individual Employee Evaluation Listing

Report Criteria

Emp Number:  

Emp Name:

Include Evaluations in report:  Yes  No

Include Observations in report:  Yes  No

Enter a Valid Vendor Number.

# Employee Disabilities

Employee Disabilities

Select by Employee:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Disabilities Report Criteria

Include Temporary:  Yes  No

Include Permanent:  Yes  No

Starting Date of Search:

Ending Date of Search:

OK Cancel

# Employee Health Events Due

Employee Health Events Due

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Start of Date Range:

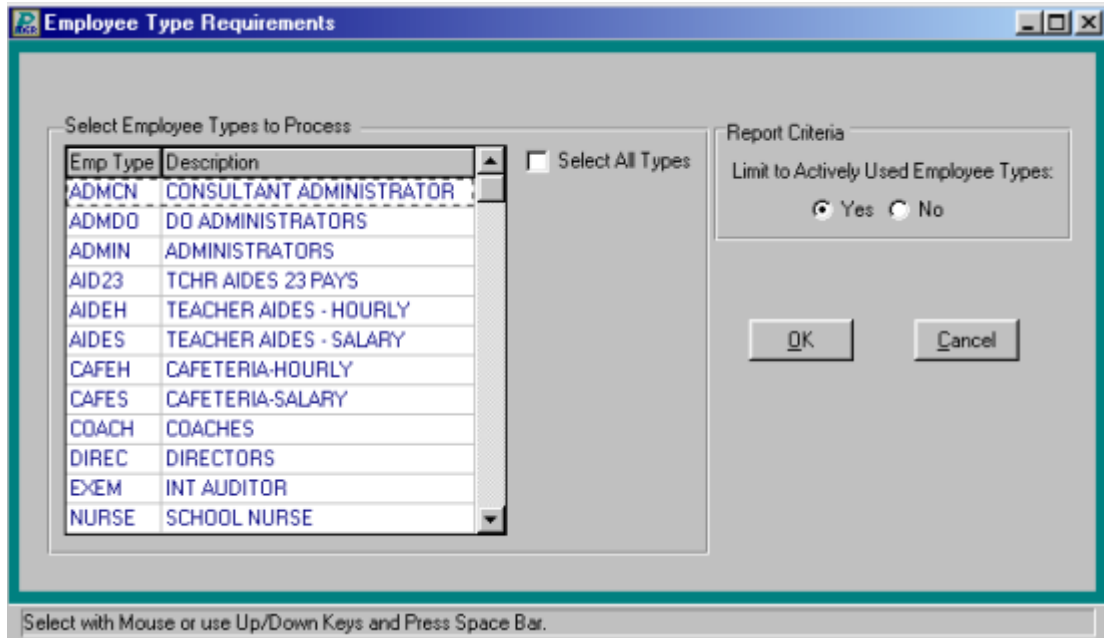
End of Due Date Range:

Last Occured Date:

Sort Repot By:  Name  Date

Page Break By Due Date:  Yes  No

# Employee Type Requirements



Select Employee Types to Process

Emp Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES
DIREC	DIRECTORS
EXEM	INT AUDITOR
NURSE	SCHOOL NURSE

Select All Types

Report Criteria

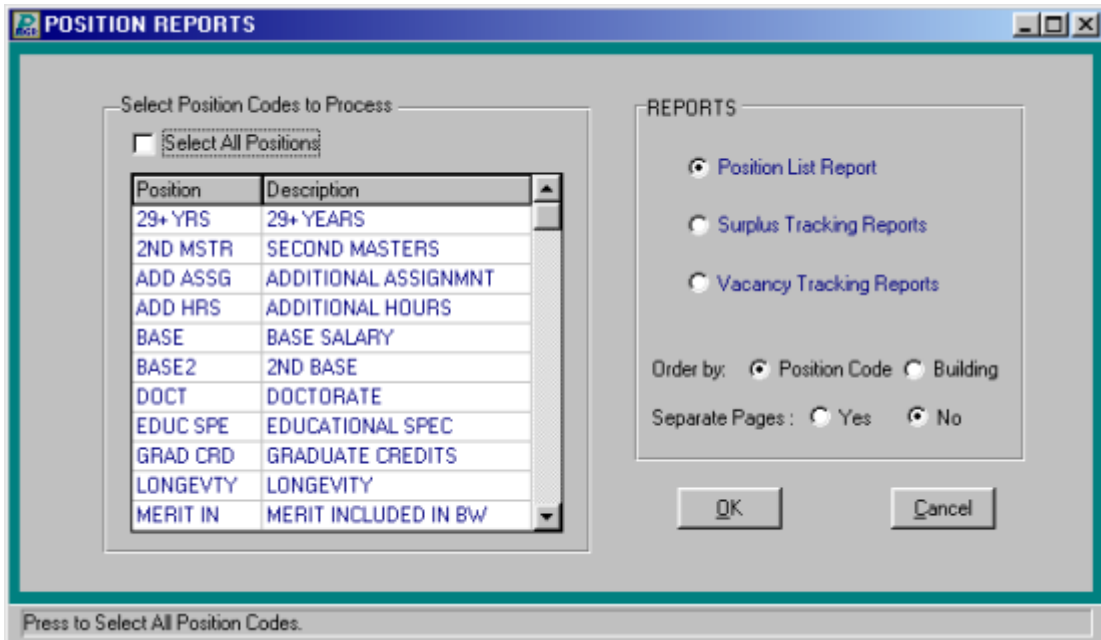
Limit to Actively Used Employee Types:

Yes  No

OK Cancel

Select with Mouse or use Up/Down Keys and Press Space Bar.

# Position Report



**POSITION REPORTS**

Select Position Codes to Process

Select All Positions

Position	Description
29+ YRS	29+ YEARS
2ND MSTR	SECOND MASTERS
ADD ASSG	ADDITIONAL ASSIGNMNT
ADD HRS	ADDITIONAL HOURS
BASE	BASE SALARY
BASE2	2ND BASE
DOCT	DOCTORATE
EDUC SPE	EDUCATIONAL SPEC
GRAD CRD	GRADUATE CREDITS
LONGEVTY	LONGEVITY
MERIT IN	MERIT INCLUDED IN BW

**REPORTS**

Position List Report

Surplus Tracking Reports

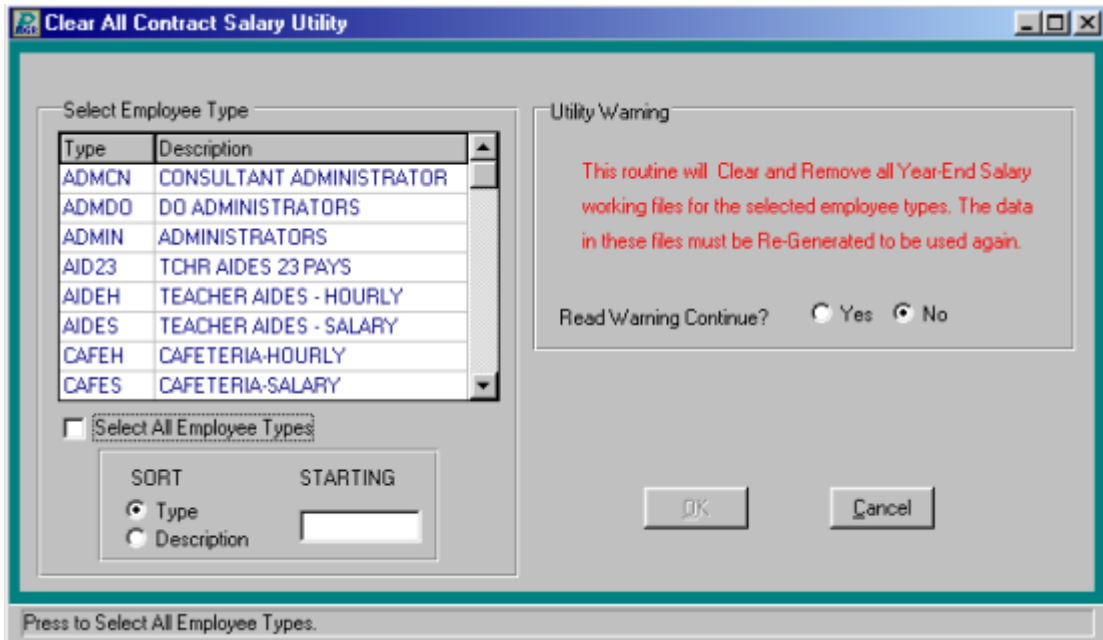
Vacancy Tracking Reports

Order by:  Position Code  Building

Separate Pages:  Yes  No

Press to Select All Position Codes.

# Clear All Contract Salary Information



# Generate Contract Salary Information

**Generate Contract Salary Utility**

Select Employee Type

Type	Description
ADM CN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY

Select All Employee Types

SORT      STARTING

Type     

Description

Step Increase Utility

Effective Date of Salary Increase: 07/01/00

Increase Step for Employees:  Automatically  
 By Date

OK      Cancel

Select with Mouse or Use Up/Down keys.



## Print Information Summary Listings

**Contract Summary Listing**

Selection Criteria

Select by Employee:  Select by Building:  Select by Department:

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Sort Report By:  All Employees  Errors Only

OK Cancel

# Modify Contract Salary Information

**Contract Salary Information**

Emp#	Name	Seq	Eff Date	New Level	New Step
2	ABRAHAM, VIRGIN	1	07/01/99		0.00
2	ABRAHAM, VIRGIN	2	07/01/99	MA	9.85
2	ABRAHAM, VIRGIN	3	07/01/99		0.00
10	AIELLO-CLOUTIER,	1	07/01/99	MA	6.19
10	AIELLO-CLOUTIER,	2	07/01/99		0.00
10	AIELLO-CLOUTIER,	3	07/01/99		0.00
10	AIELLO-CLOUTIER,	4	07/01/99		0.00
11	AINSLIE, JANE M	1	07/01/99	BA	2.40
13	AKLAND, CAROLYN	1	07/01/99	MA	22.00
13	AKLAND, CAROLYN	2	07/01/99		0.00

Employee: 2 ABRAHAM, VIRGINIA  
 Employee Type: NOT AVAIL  
 Building: NOT AVAIL Position: ADD ASSG  
 Contract: TCHR 99-00 Sequence: 1  
 CURRENT PROJECTED  
 CONTRACT INFO CONTRACT INFO  
 Eff Date: 03/15/99 Eff Date: 07/01/99  
 Level: Level:   
 Step: 0.00 Step: 0.00  
 Contract: 1,096.04 Contract: 1,096.04  
 FTE: 100.00 FTE: 100.00  
 Days: 200.00 Days: 200.00  
 Entitle: 1,096.04 Entitle: 1,096.04

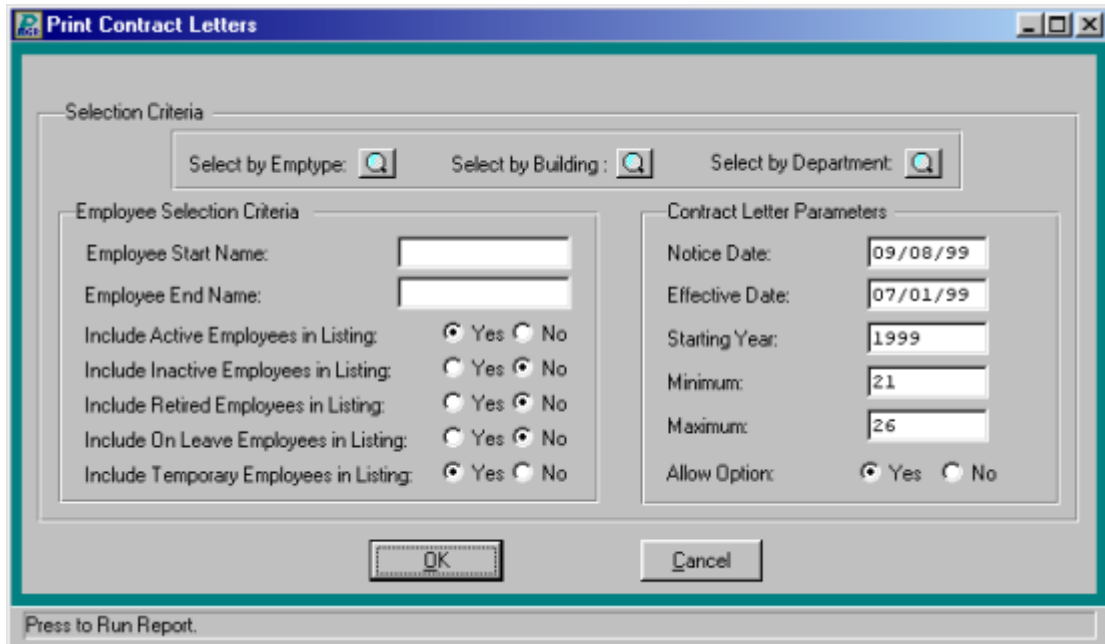
SORT STARTING  
 Emp #   
 Name

First Prev Next Last

Save Reset Delete Cancel Exit

Enter the New Level for this Employee.

# Printing Contract Letters



**Print Contract Letters**

Selection Criteria

Select by Emptype:  Select by Building:  Select by Department:

Employee Selection Criteria

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

Contract Letter Parameters

Notice Date:

Effective Date:

Starting Year:

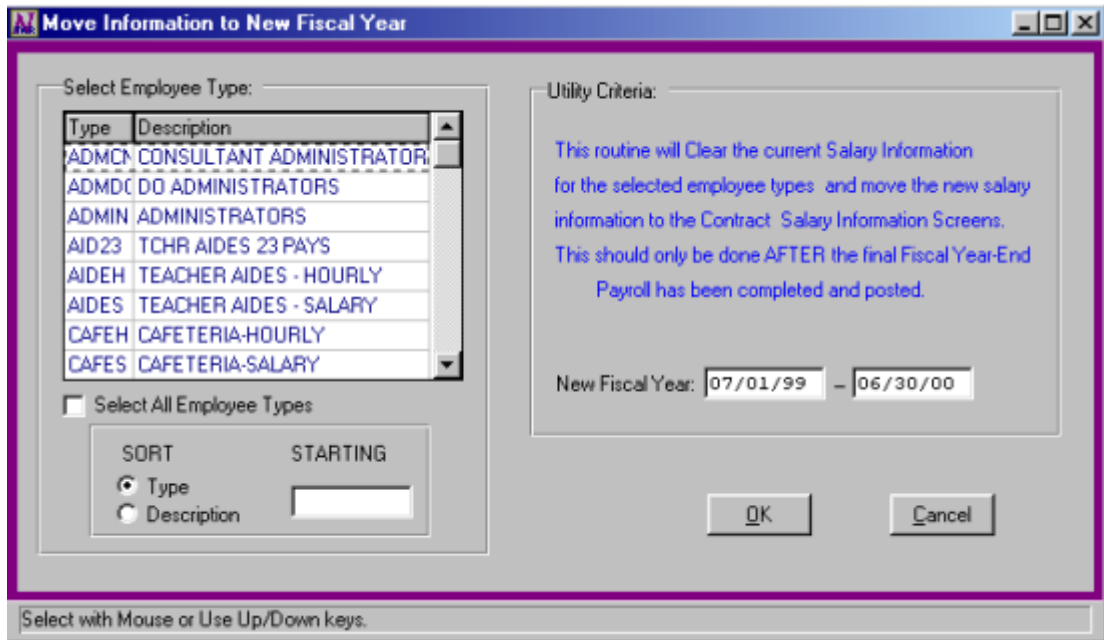
Minimum:

Maximum:

Allow Option:  Yes  No

Press to Run Report.

# Move Information to Employee Information



**Move Information to New Fiscal Year**

Select Employee Type:

Type	Description
ADMCA	CONSULTANT ADMINISTRATOR
ADMDC	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY

Select All Employee Types

**SORT**      **STARTING**

Type     

Description

Utility Criteria:

This routine will Clear the current Salary Information for the selected employee types and move the new salary information to the Contract Salary Information Screens. This should only be done AFTER the final Fiscal Year-End Payroll has been completed and posted.

New Fiscal Year:  -

Select with Mouse or Use Up/Down keys.

# Attendance Confirmation Letters

Select by Employee:  Select by Building:  Select by Department:

**Employee Selection Criteria**

Employee Start Name:

Employee End Name:

Include Active Employees in Listing:  Yes  No

Include Inactive Employees in Listing:  Yes  No

Include Retired Employees in Listing:  Yes  No

Include On Leave Employees in Listing:  Yes  No

Include Temporary Employees in Listing:  Yes  No

**Attendance Balance Criteria**

**DEFAULT**      **NEW LABEL**

Initial Balance :

Projected Accrual :

Time Used :

Projected Balance :

Return Letter To :

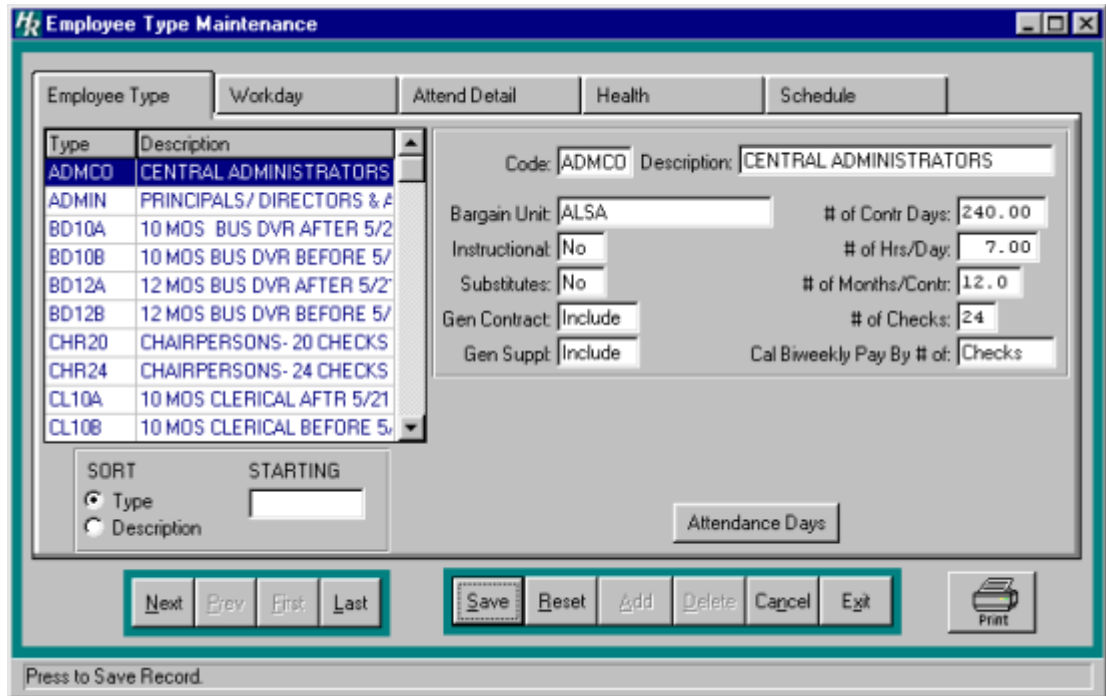
Starting Fiscal Year :

Ending Fiscal Year :

Return Date :

Effective Date :

# Employee Types



**Employee Type Maintenance**

Employee Type | Workday | Attend Detail | Health | Schedule

Type	Description
ADMCO	CENTRAL ADMINISTRATORS
ADMIN	PRINCIPALS/ DIRECTORS & A
BD10A	10 MOS BUS DVR AFTER 5/2
BD10B	10 MOS BUS DVR BEFORE 5/
BD12A	12 MOS BUS DVR AFTER 5/2
BD12B	12 MOS BUS DVR BEFORE 5/
CHR20	CHAIRPERSONS- 20 CHECKS
CHR24	CHAIRPERSONS- 24 CHECKS
CL10A	10 MOS CLERICAL AFTR 5/21
CL10B	10 MOS CLERICAL BEFORE 5.

Code: ADMCO Description: CENTRAL ADMINISTRATORS

Bargain Unit: ALSA # of Contr Days: 240.00

Instructional: No # of Hrs/Day: 7.00

Substitutes: No # of Months/Contr: 12.0

Gen Contract: Include # of Checks: 24

Gen Suppl: Include Cal Biweekly Pay By # of: Checks

SORT STARTING  
 Type  
 Description

Attendance Days

Next Prev First Last Save Reset Add Delete Cancel Exit Print

Press to Save Record.

# Attendance Days

**Employee Type Maintenance**

Employee Type | Workday | Attend Detail | Health | Schedule

Type	Description
ADMCO	CENTRAL ADMINISTRATORS
ADMIN	PRINCIPALS/ DIRECTORS & A
BD10A	10 MOS BUS DVR AFTER 5/2
BD10B	10 MOS BUS DVR BEFORE 5/
BD12A	12 MOS BUS DVR AFTER 5/2
BD12B	12 MOS BUS DVR BEFORE 5/
CHR20	CHAIRPERSONS- 20 CHECKS
CHR24	CHAIRPERSONS- 24 CHECKS
CL10A	10 MOS CLERICAL AFTR 5/21
CL10B	10 MOS CLERICAL BEFORE 5/

Code: ADMCO    Description: CENTRAL ADMINISTRATORS

Rpt-Line:

TYPE	ANNUAL AMT	MAXIMUM AMT	ACCRUE RATE
SICK DAYS	0.0	0.0	0.00
PERSONAL DAYS	0.0	0.0	0.00
VACATION DAYS	0.0	0.0	0.00
COMP DAYS	0.0	0.0	0.00

Personal: 0.0    Convert To Sick: No  
 Comp: 0.0    Convert to Sick: No

Employee Type

Type    STARTING   
 Description

# Workday Calendar

The screenshot shows a software window titled "Employee Type Maintenance" with a tabbed interface. The "Workday" tab is active, displaying a calendar for September 1999 and a summary table.

**Employee Type Workday Calendar**

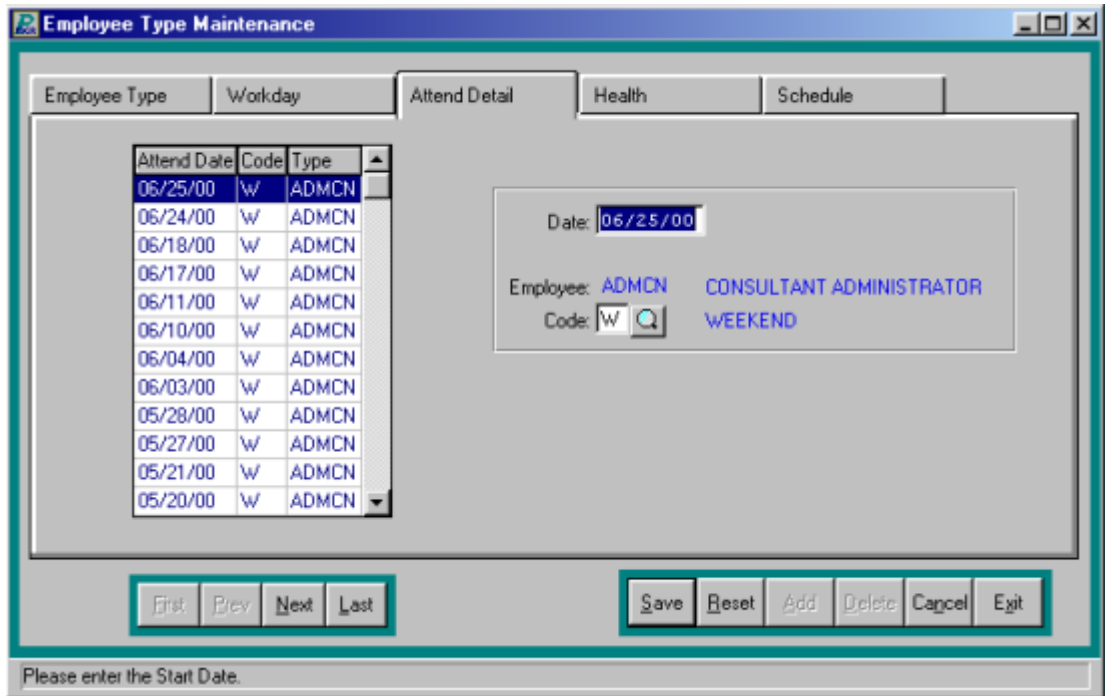
Category	Value
HOLIDAY.....	3.000
OTHER.....	0.000
WEEKENDS.....	105.000
WORKING DAYS	257.000

Navigation buttons: First, Prev, Next, Last

Footer: Enter Code, or Double-Click with Mouse or Press F6 for LookUp.



# Attendance Detail



The screenshot shows a software window titled "Employee Type Maintenance" with a tabbed interface. The "Attend Detail" tab is active, displaying a table of attendance records and a summary panel on the right. The table lists dates from 05/20/00 to 06/25/00, all with a code of 'W' and type of 'ADMCN'. The summary panel shows the selected date as 06/25/00, employee type as ADMCN (CONSULTANT ADMINISTRATOR), and code as W (WEEKEND). Navigation and action buttons are located at the bottom of the window.

Attend Date	Code	Type
06/25/00	W	ADMCN
06/24/00	W	ADMCN
06/18/00	W	ADMCN
06/17/00	W	ADMCN
06/11/00	W	ADMCN
06/10/00	W	ADMCN
06/04/00	W	ADMCN
06/03/00	W	ADMCN
05/28/00	W	ADMCN
05/27/00	W	ADMCN
05/21/00	W	ADMCN
05/20/00	W	ADMCN

Date: 06/25/00

Employee: ADMCN CONSULTANT ADMINISTRATOR

Code: W WEEKEND

Buttons: First, Prev, Next, Last, Save, Reset, Add, Delete, Cancel, Exit

Please enter the Start Date.

# Employee Type Health

The screenshot shows the 'Employee Type Maintenance' application window with the 'Health' tab selected. The window contains a table with the following data:

Type	Health Event	Next Due Dt	Required
ADMEN	Physical		Yes

Below the table is a form for editing details:

Employee Type: ADMEN  
Health Event: Physical  
Required: Yes  
Next Due: / /  
Comments:

Navigation buttons: First, Prev, Next, Last, Save, Reset, Add, Delete, Cancel, Exit.

Footer: Are there any Special Instructions?

# Salary Schedule

The screenshot shows a software window titled "Employee Type Maintenance" with a tabbed interface. The "Schedule" tab is active, displaying a table with one row of data and a form for editing details.

Type	Description	Ctl No	Effect Date	Step Incr	Schedule Type
ADMCO	CENTRAL ADMINIST	1	12/10/99	Full Year	Salary

EmployeeType: ADMCO  
Control Id: 1  
Effective Date: 12/10/99  
Start Date: 12/12/98  
End Date: 12/12/99  
Schedule Type: Salary

Navigation buttons: Next, Prev, First, Last, Save, Reset, Add, Delete, Cancel, Exit, Print

Press to Lookup Salary Schedules.

# Attendance Codes

The screenshot shows the 'Personnel Manager Maintenance' window with the 'Attend Codes' tab selected. A table lists three attendance codes: \*C (COMP TIME ACCRUAL), \*P (PERSONAL ACCRUAL), \*S (SICK ACCRUAL), and \*V (VACATION ACCRUAL). The \*C code is currently selected, and its details are shown in a form on the right, including Name, Chargeable status, Type, Unit Type, and Seniority.

Code	Description	Chg	Charge Against	Sen
*C	COMP TIME ACCRUAL	yes	COMP TIME	No
*P	PERSONAL ACCRUAL	yes	PERSONAL	No
*S	SICK ACCRUAL	yes	SICK	No
*V	VACATION ACCRUAL	yes	VACATION	No

**Attend Code Details:**

Code: \*C  
Name: COMP TIME ACCRUAL  
Chargeable: YES    Type: COMP TIME  
Unit Type:  Hourly     Daily  
Seniority: NO

**Navigation and Action Buttons:** Next, Prev, First, Last, Save, Reset, Add, Delete, Cancel, Exit, Print

Enter unit type: (H)ourly, (D)aily

# Benefit Codes

Personnel Manager Maintenance

Attend Codes | **Benefit Codes** | Eval Types | Civ Ser Codes | Certif Types

Provider	Type
US Health Care	HEALTH
Vytra	HEALTH

Type: Health

Provider: US Health Care

Policy Number: 9999999

\*\*\*\*\* COVERAGE INFORMATION \*\*\*\*\*

Coverage	Ded Code	TL	Cost	\$/%	Emp Cost	Employer Cost
Family	<input type="text"/>	<input type="text"/>	0.00	\$	0.00	0.00
Individual	<input type="text"/>	<input type="text"/>	0.00	\$	0.00	0.00
Spousal	<input type="text"/>	<input type="text"/>	0.00	\$	0.00	0.00

TYPE

- Health
- Dental
- Life
- Disability
- Major Med
- Other
- All

Next Prev Exit Last

Save Reset Add Delete Cancel Exit

Print

Enter the employer portion of the total annual cost.

# Evaluation Types

Personnel Manager Maintenance

Attend Codes | Benefit Codes | Eval Types | Civ Ser Codes | Certif Types

Type	Description	Obser
1Year	1 Year Evaluation	No
6month	6th Month observation	Yes

Sort:  Type  Description

Starting:

Type:

Description:

Observation:

Next Prev First Last Save Reset Add Delete Cancel Exit Print

Press to Run Report.

# Civil Service Codes

Personnel Manager Maintenance

Attend Codes | Benefit Codes | Eval Types | **Civ Ser Codes** | Certif Types

Civil Service Code	Title	Juris Class	Status
10P	HD CUST 1		yes
1AR	FSH SUB		yes
1AT	FSH PT		yes
1BA	FSH		yes
1CA	ASST COOK		yes
1CK	COOK		yes
1DA	COOK MGR		yes
1EK	SCH LUNCH MGR		yes

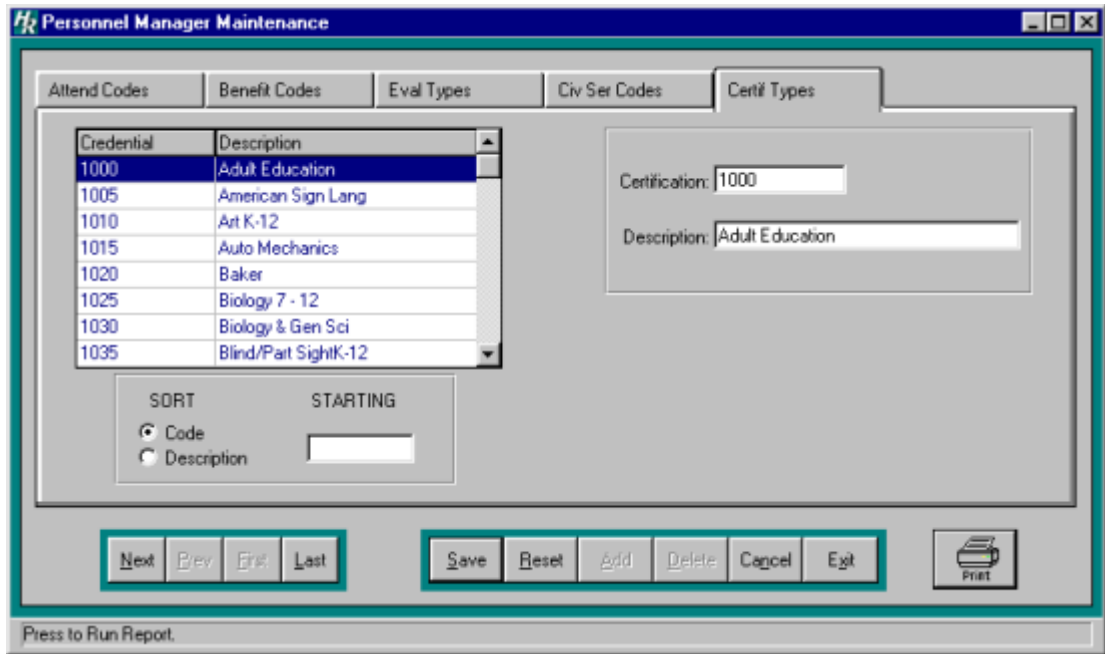
Alpha Code: 10P  
Numeric Code:  
Title: HD CUST 1  
Time:  
Juris Class:  
Status: ACTIVE

SDRT      STARTING  
 Code        
 Title

Next   Brev   End   Last      Save   Reset   Add   Delete   Cancel   Exit      Print

Press to Run Report.

# Certification Types





# Employee Calendar Codes

The screenshot shows a software window titled "Personnel Manager Maintenance". At the top, there are five tabs: "Emp Cal Code", "Health Ev Typ", "Position Code", "Retiremt Code", and "Tenure Type". The "Emp Cal Code" tab is active. Below the tabs is a table with two columns: "Code" and "Description". The table contains three rows: "H" for "HOLIDAY", "O" for "OTHER", and "W" for "WEEKEND". The "HOLIDAY" row is selected. To the right of the table is a form with two fields: "Code:" with a dropdown menu showing "H" and "Description:" with a text box containing "HOLIDAY". Below the table is a "SORT" section with two radio buttons: "Code" (selected) and "Description". To the right of the "SORT" section is a "STARTING" section with a text box. At the bottom of the window, there are two groups of buttons. The first group contains "First", "Prev", "Next", and "Last". The second group contains "Save", "Reset", "Add", "Delete", "Cancel", and "Exit". At the very bottom of the window, there is a status bar with the text "Enter a code for this calendar type."

Code	Description
H	HOLIDAY
O	OTHER
W	WEEKEND

Code: H  
Description: HOLIDAY

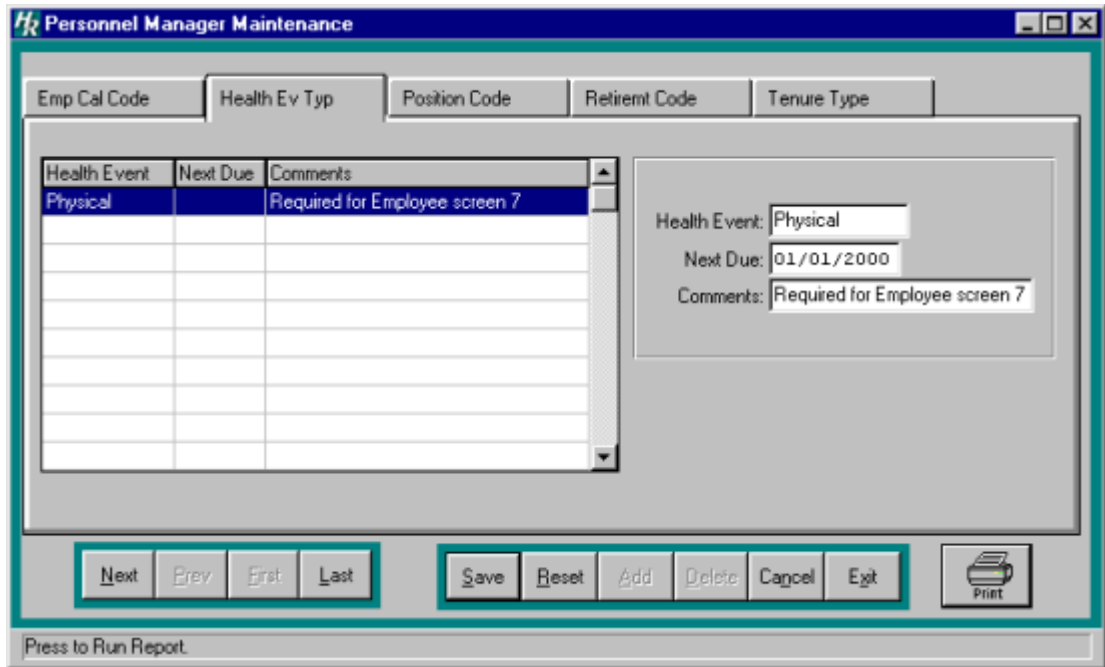
SORT  
 Code  
 Description

STARTING

First Prev Next Last Save Reset Add Delete Cancel Exit

Enter a code for this calendar type.

# Health Event Types



Personnel Manager Maintenance

Emp Cal Code    Health Ev Typ    Position Code    Retirement Code    Tenure Type

Health Event	Next Due	Comments
Physical		Required for Employee screen 7

Health Event: Physical  
Next Due: 01/01/2000  
Comments: Required for Employee screen 7

Next    Prev    First    Last    Save    Reset    Add    Delete    Cancel    Exit    Print

Press to Run Report.

# Position Codes

Personnel Manager Maintenance

Emp Cal Code    Health Ev Typ    Position Code    Retirement Code    Tenure Type

Position	Description	CS Code	Bldg	FTE Total	Certif	Tenure
ACCTCL	ACCOUNT CLE	CAK		100.00		
CLEANE	CLEANER	1KK		100.00		
CLKTYP	CLERK TYPIST	AGA		100.00		
CUST	CUSTODIAN	1MA		100.00		
HD CJS	HEAD CUSTOC	10P		100.00		
HDCUS	HEAD CUSTOC	1PA		100.00		
SRACCT	SR ACCOUNT (CAP			100.00		

SORT    STARTING  
 Code      
 Description  
 Certification Type

Position Code: ACCTCLK  
 Description: ACCOUNT CLERK  
 Civil Service Code: CAK   
 Building: G   
 Total FTE: 100.00  
 Certification:   
 Tenure Area:

Press to lookup Tenure Types.

# Departments

The screenshot shows a software window titled "Payroll Maintenance Menu". At the top, there are several tabs: "Depts", "Buildings", "Accounts", "Ded Codes", "Pay Freqs", and "Eam Codes". The "Depts" tab is active, displaying a list of departments in a table:

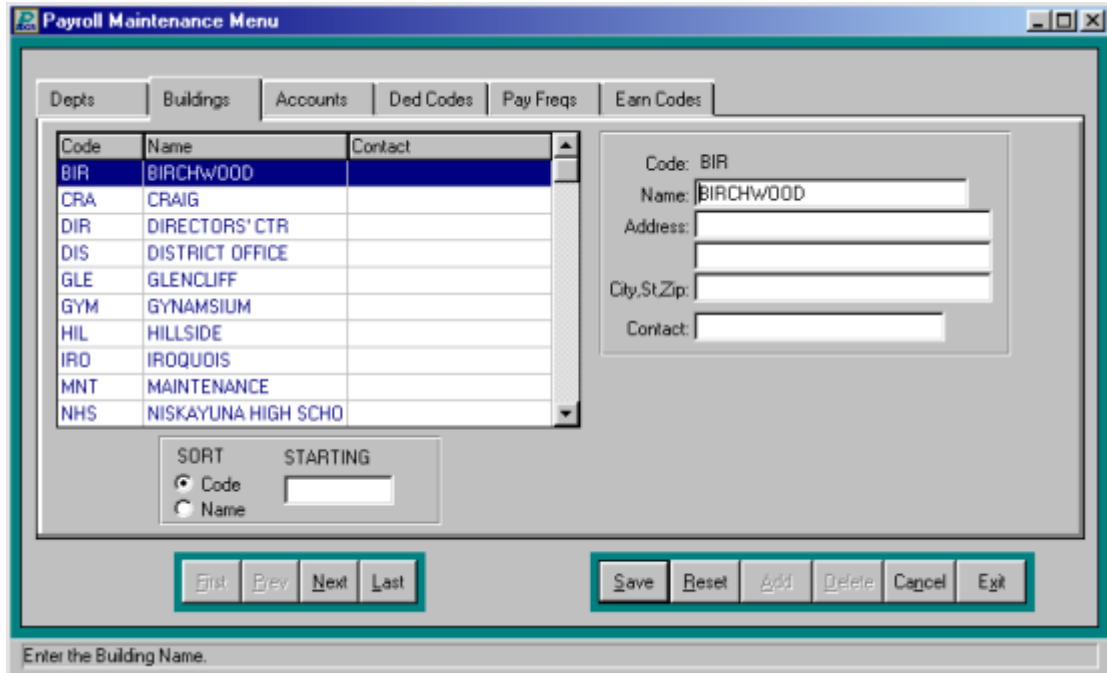
Dept Code	Department Name
BIR	BIRCHWOOD
BJULE	JULET
CRA	CRAIG
DIR	DIRECTORS' OFFICE
DIS	DISTRICT OFFICE
GLE	GLENCLIFF
GYM	GYMNASIUM
HIL	HILLSIDE
IRD	IROQUOIS
MNT	MAINTENANCE

Below the table, there are two radio buttons for sorting: "Code" (selected) and "Name". To the right of the table is a summary box containing the text: "Code: BIR" and "Name: BIRCHWOOD".

At the bottom of the window, there are two groups of buttons. The first group includes "First", "Prev", "Next", and "Last". The second group includes "Update", "Reset", "Add", "Delete", "Cancel", and "Exit".

At the very bottom of the window, there is a status bar that reads "Press for Next Record."

# Buildings



Payroll Maintenance Menu

Depts Buildings Accounts Ded Codes Pay Freqs Earn Codes

Code	Name	Contact
BIR	BIRCHWOOD	
CRA	CRAIG	
DIR	DIRECTORS' CTR	
DIS	DISTRICT OFFICE	
GLE	GLENCLIFF	
GYM	GYNASIUM	
HIL	HILLSIDE	
IRO	IROQUOIS	
MNT	MAINTENANCE	
NHS	NISKAYUNA HIGH SCHO	

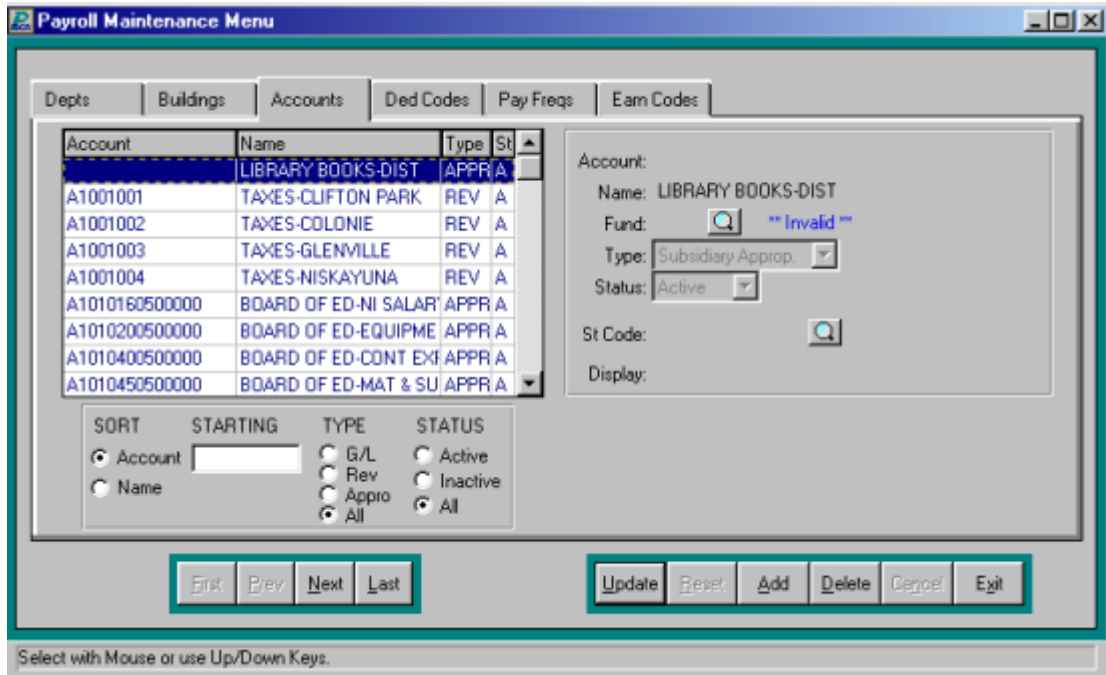
Code: BIR  
Name: BIRCHWOOD  
Address: \_\_\_\_\_  
City, St, Zip: \_\_\_\_\_  
Contact: \_\_\_\_\_

SORT STARTING  
 Code   
 Name

First Prev Next Last Save Reset Add Delete Cancel Exit

Enter the Building Name.

# Accounts



# Deduction Codes

**Payroll Maintenance Menu**

Depts | Buildings | Accounts | **Ded Codes** | Pay Freqs | Earn Codes

Code	Description	Tax Type
BC17FAM*	BC-17%-FAM-FLEX	Before
BC17IND	BC-17%-IND	After
BC182PC	BC-18%-2 PERS-CHILD	After
BC182PS*	BC-18%-2P-SPOUSE-FLE	Before
BC18FAM	BC-18%-FAM	After
BC18FAM*	BC-18%-FAM-FLEX	Before
BC18IND	BC-18%-IND	After
BC18IND*	BC-18%-IND-FLEX	Before
BC192PC*	BC-19%-2P-CHILD-FLEX	Before

Code    STARTING:      All  
 Description     Before Tax  
 After Tax

Code: BC17FAM    Descr: BC-17%-FAM-FLEX  
 Annuity: No    Bond: No    Flex: Yes    Flex Type: Medical  
 Type: Before Tax Deduction From Gross  
 Bank Acct: No    Exclude From Calc: no    Print Pos: 0  
 \*\*\*\*\* DEFAULT SETTINGS \*\*\*\*\*  
 Pay Freq:     Ded Year: F    Amt/Pct: 0.00  
 Times Taken: 0    Ded Type:     Dollar Lim: 0.00  
 \*\*\*\*\* ACCOUNTING INFORMATION \*\*\*\*\*  
 G/L Acct:     A/P Vend: 0   

Select with Mouse or use Up/Down Keys.

# Pay Frequencies

The screenshot shows the 'Payroll Maintenance Menu' window with the 'Pay Freqs' tab selected. The main area contains a table of pay frequencies and a detailed view of the selected item (Code: 1020).

Code	Description	Checks	Type
1020	10 MO-20 PAYS TSA/TL	20	DEDUCTIONS
1021	10 MO-21 PAYS-INS	21	DEDUCTIONS
10MO	10 MONTH PAY	21	EARNINGS
11MO	11 MONTH PAY	24	EARNINGS
12MO	12 MONTH PAY	26	EARNINGS
1PAY	PAY 1 YR - MER/LONG	1	EARNINGS
4X	SPECIAL ED PROG 4PAY	4	EARNINGS
9-18	9 MO 18 PAYS	18	DEDUCTIONS
9-19	9 MONTHS 19 PAYS	19	DEDUCTIONS

Navigation buttons: **First**, **Prev**, **Next**, **Last**, **Update**, **Reset**, **Add**, **Delete**, **Cancel**, **Exit**

Sort and Starting options:  
SORT:  Code,  Description  
STARTING:

Details for selected item (Code: 1020):  
Description: 10 MO-20 PAYS TSA/TL  
Checks: 20  
Type: **DEDUCTIONS**

Select with Mouse or use Up/Down Keys.



# Earning Codes

**Payroll Maintenance Menu**

Depts | Buildings | Accounts | Ded Codes | Pay Freqs | **Earn Codes**

Code	Description	Amt Type	WageType
29+ YRS	29+ YRS	Fixed	Wages
2ND MA	SECOND MASTERS	Fixed	Wages
ADD ASGN	ADDITIONAL ASSIG	Individual	Wages
ADD HRS	ADDITIONAL HOUR	Individual	Wages
ADVISOR	ADVISOR	Individual	Wages
BD REC	BOARD RECORDER	Individual	Wages
BUS DUTY	BUS DUTY	Individual	Wages
CAF DUTY	CAFE DUTY	Individual	Wages
COACH	COACHES	Individual	Wages

Code     Description    STARTING:     AMOUNT TYPE:  Fixed   
 Description     Individual     Both

Code: 29+ YRS  
 Description: 29+ YRS  
 Amt Type: Fixed Amt  
 Wage Type: Wages  
 Inc In Contract: yes    Print Position: 0  
 \*\*\*\*\* DEFAULT SETTINGS \*\*\*\*\*  
 Def Earn Freq:     Times Paid: 0    Fixed Amt: 0.00  
 Earn Yr:     Dollar Limit: 2,450.00  
 \*\*\*\*\* ACCOUNTING INFORMATION \*\*\*\*\*  
 Acct:

Press for Next Record

# Direct Deposit Banks

The screenshot shows a 'Bank Maintenance' window with a table of banks and a details panel for the selected bank, ADIRONDACK TRUST.

Bank Code	Name	City
ADIR TST	ADIRONDACK TRUST	tomsriver
ALBANK	ALBANK	
AMSTERD	AMSTERDAM FED SAVINGS	
AMSTRDA	AMSTERDAM SAVINGS	
BALSPA N	BALLSTON SPA NATIONAL B	
BOST DEP	BOSTON SAFE DEPOSIT & TI	
CAP BANK	CAPITAL BANK & TRUST	
CAP COMM	CAPITAL COMMUNICATION	
CEN NAT	CENTRAL NATIONAL BANK	

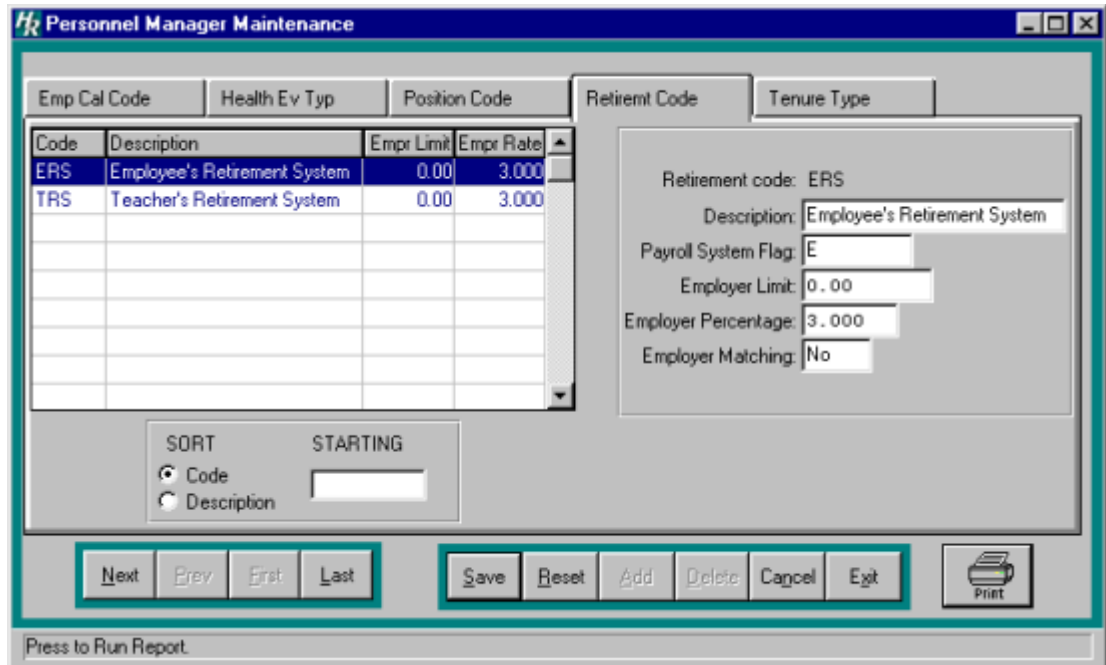
Bank Code: ADIR TST    Routing #: 021302884  
Name: ADIRONDACK TRUST  
Address:  
City/St/Zip: tomsriver                      NY  
Contact:  
Phone:

**Sort Options:**  
STARTING [ ]  
 Code  
 Name  
 City

Navigation buttons: First, Prev, Next, Last, Update, Reset, Add, Delete, Cancel, Exit

Press to Save Record.

# Retirement System Codes



Code	Description	Empr Limit	Empr Rate
ERS	Employee's Retirement System	0.00	3.000
TRS	Teacher's Retirement System	0.00	3.000

Retirement code: ERS  
Description: Employee's Retirement System  
Payroll System Flag: E  
Employer Limit: 0.00  
Employer Percentage: 3.000  
Employer Matching: No

Next Prev First Last Save Reset Add Delete Cancel Exit Print

Press to Run Report.

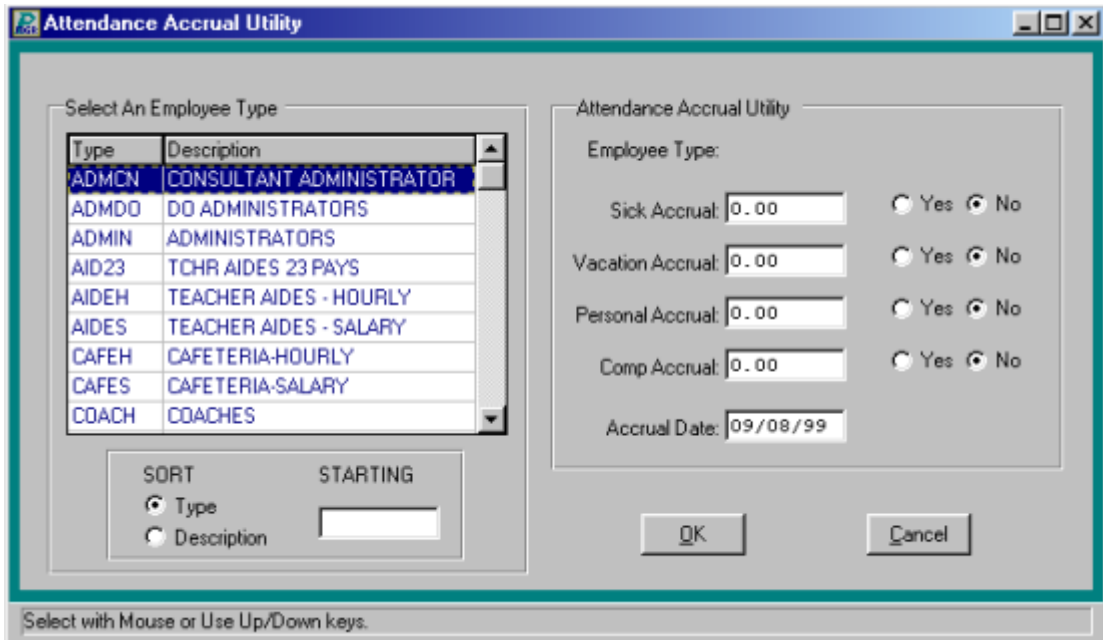
# Tenure Area Types

The screenshot shows a software window titled "Personnel Manager Maintenance". At the top, there are several tabs: "Emp Cal Code", "Health Ev Typ", "Position Code", "Retiremt Code", and "Tenure Type". The "Tenure Type" tab is currently selected. Below the tabs is a table with two columns: "Tenure Code" and "Description". The table contains three rows of data:

Tenure Code	Description
CQ	Cert. of Qualif
PERM	Permanent
PR	Provisional

Below the table, there are two sections: "SORT" with radio buttons for "Code" (selected) and "Description", and "STARTING" with an empty text input field. To the right of the table is a summary box containing the text "Tenure Code: CQ" and "Description: Cert. of Qualif". At the bottom of the window, there are two groups of buttons. The first group includes "Next", "Prev", "First", and "Last". The second group includes "Save", "Reset", "Add", "Delete", "Cancel", and "Exit". A "Print" button with a printer icon is also present. At the very bottom, there is a status bar that says "Press to Run Report."

# Attendance Accrual



The dialog box is titled "Attendance Accrual Utility". It is divided into two main sections. The left section, titled "Select An Employee Type", contains a table with two columns: "Type" and "Description". The "Type" column lists various employee categories, and the "Description" column provides details for each. The "ADMN" row is currently selected. Below the table are two radio button options for "SORT": "Type" (selected) and "Description". To the right of these is a "STARTING" label and an empty text input field. The right section, titled "Attendance Accrual Utility", contains a label "Employee Type:" followed by a dropdown menu. Below this are four rows, each with a label, a text input field, and two radio buttons: "Sick Accrual: 0.00" (Yes/No), "Vacation Accrual: 0.00" (Yes/No), "Personal Accrual: 0.00" (Yes/No), and "Comp Accrual: 0.00" (Yes/No). At the bottom of this section is a label "Accrual Date:" followed by a date input field containing "09/08/99". At the very bottom of the dialog are "OK" and "Cancel" buttons. A status bar at the bottom of the window reads "Select with Mouse or Use Up/Down keys."

Type	Description
ADMN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES

Attendance Accrual Utility

Select An Employee Type

Employee Type:

Sick Accrual: 0.00  Yes  No

Vacation Accrual: 0.00  Yes  No

Personal Accrual: 0.00  Yes  No

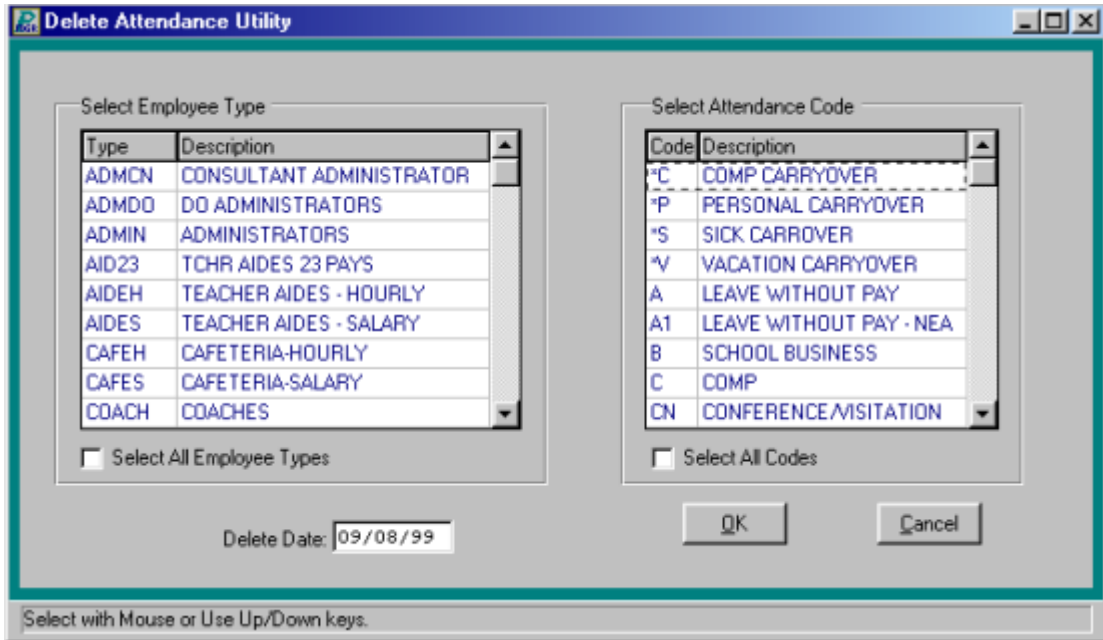
Comp Accrual: 0.00  Yes  No

Accrual Date: 09/08/99

OK Cancel

Select with Mouse or Use Up/Down keys.

# Delete Attendance Utility



Select Employee Type

Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES

Select All Employee Types

Delete Date: 09/08/99

Select Attendance Code

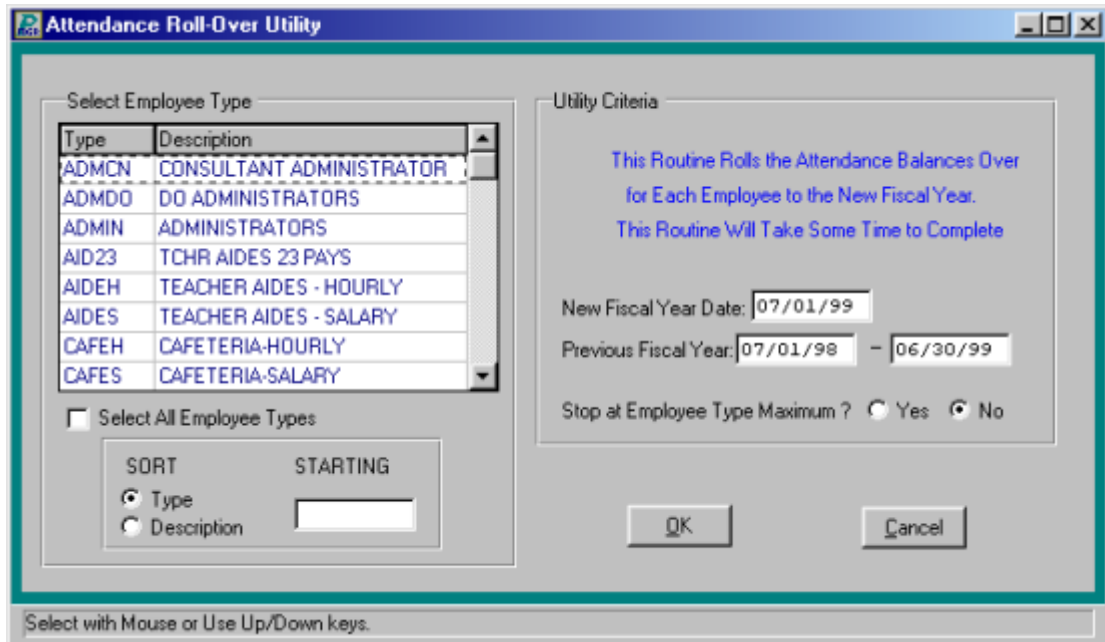
Code	Description
*C	COMP CARRYOVER
*P	PERSONAL CARRYOVER
*S	SICK CARROVER
*V	VACATION CARRYOVER
A	LEAVE WITHOUT PAY
A1	LEAVE WITHOUT PAY - NEA
B	SCHOOL BUSINESS
C	COMP
CN	CONFERENCE/VISITATION

Select All Codes

OK Cancel

Select with Mouse or Use Up/Down keys.

# Attendance Balance Roll-Over



The dialog box is titled "Attendance Roll-Over Utility". It is divided into two main sections: "Select Employee Type" and "Utility Criteria".

**Select Employee Type:**

Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY

Select All Employee Types

**STARTING:**  Type  Description

**UTILITY CRITERIA:**

This Routine Rolls the Attendance Balances Over for Each Employee to the New Fiscal Year.  
This Routine Will Take Some Time to Complete

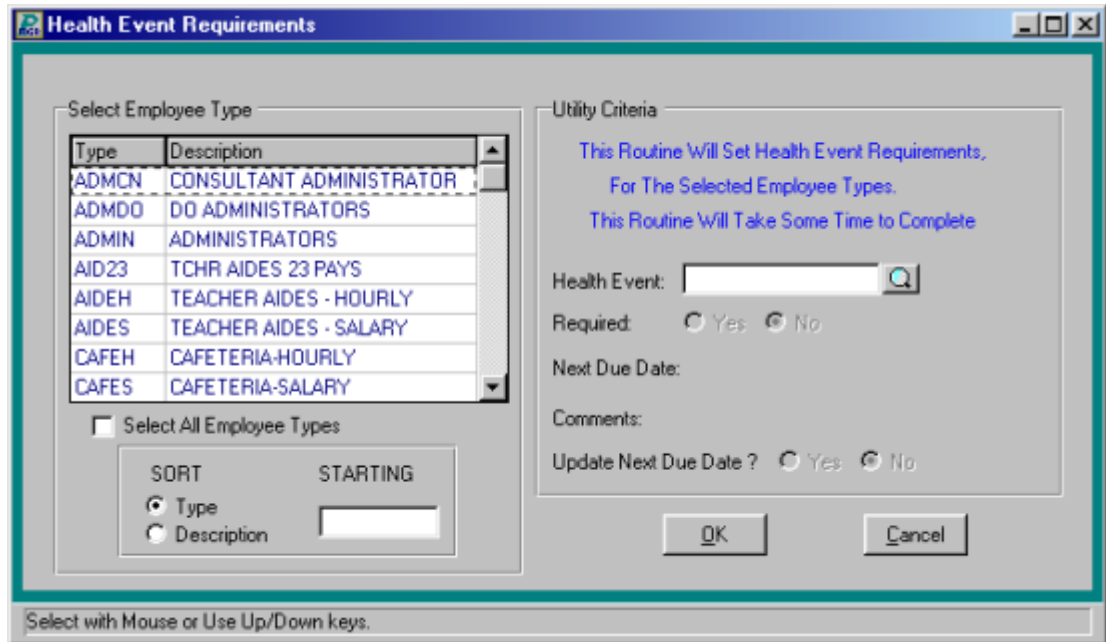
New Fiscal Year Date:

Previous Fiscal Year:  -

Stop at Employee Type Maximum?  Yes  No

Select with Mouse or Use Up/Down keys.

# Health Event Requirement



**Health Event Requirements**

Select Employee Type

Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY

Select All Employee Types


SORT                      STARTING

Type                     

Description

Utility Criteria

This Routine Will Set Health Event Requirements,  
For The Selected Employee Types.  
This Routine Will Take Some Time to Complete

Health Event:  

Required:  Yes  No

Next Due Date:

Comments:

Update Next Due Date ?  Yes  No

Select with Mouse or Use Up/Down keys.



# Payment Method

Code	Description
A	Annualize
C	Contractual
D	Daily
H	Hourly
S	Supplemental

SORT      STARTING

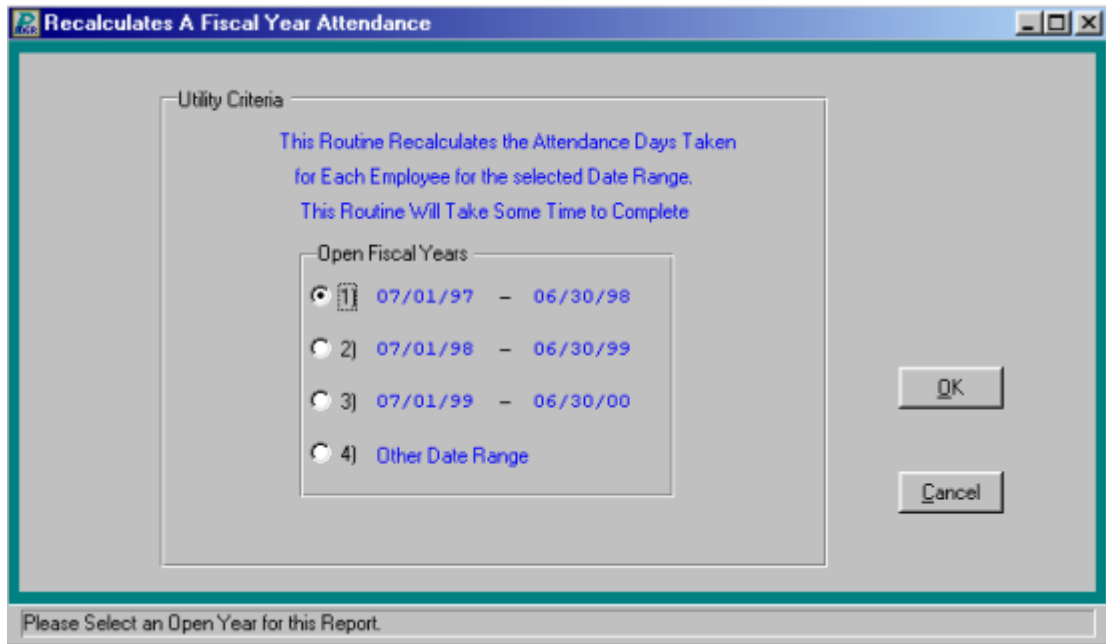
Code  
 Description

Next   Prev   First   Last

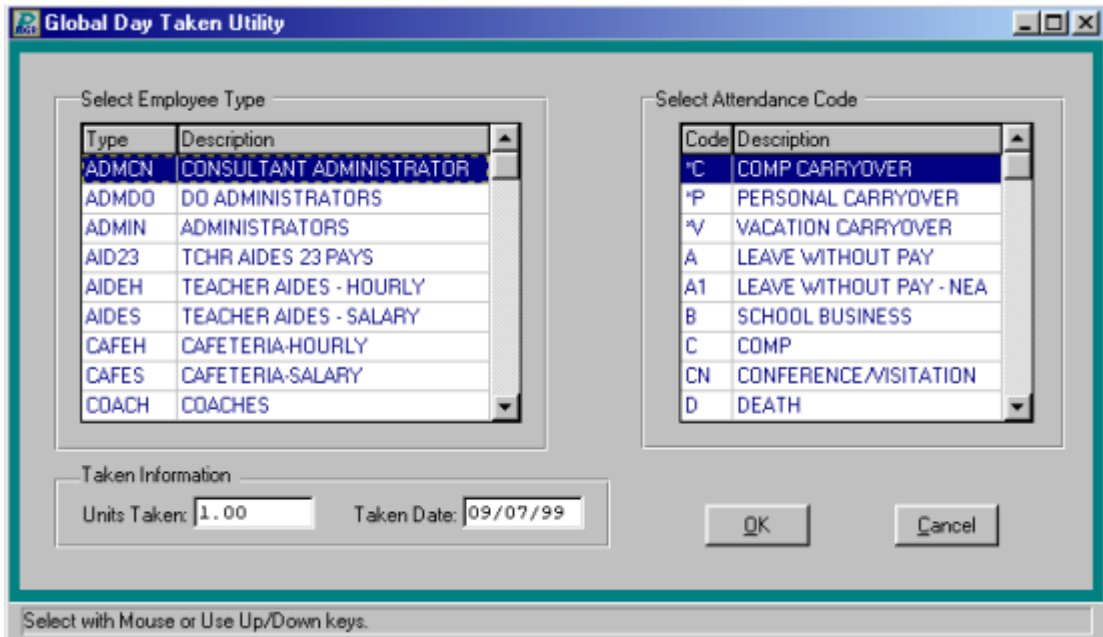
Update   Reset   Add   Delete   Cancel   Exit

Press to Save Record.

# Re-Calculate Attendance Taken Amounts



# Record Global Attendance



**Global Day Taken Utility**

Select Employee Type

Type	Description
ADM CN	CONSULTANT ADMINISTRATOR
ADM DO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AID EH	TEACHER AIDES - HOURLY
AID ES	TEACHER AIDES - SALARY
CAF EH	CAFETERIA-HOURLY
CAF ES	CAFETERIA-SALARY
COACH	COACHES

Select Attendance Code

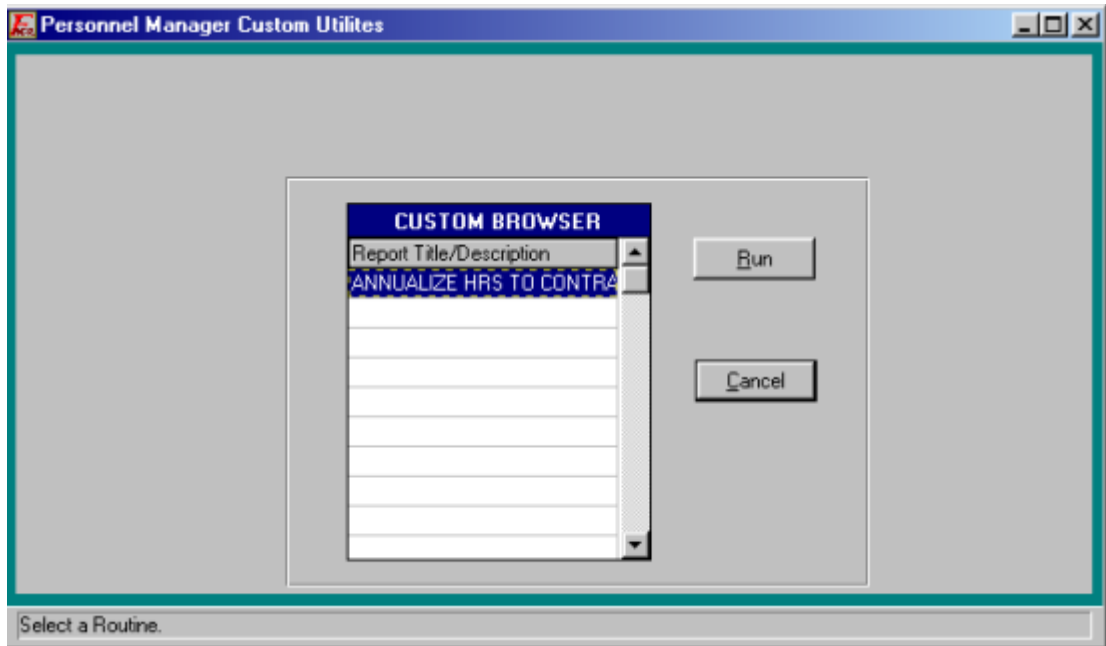
Code	Description
*C	COMP CARRYOVER
*P	PERSONAL CARRYOVER
*V	VACATION CARRYOVER
A	LEAVE WITHOUT PAY
A1	LEAVE WITHOUT PAY - NEA
B	SCHOOL BUSINESS
C	COMP
CN	CONFERENCE/VISITATION
D	DEATH

Taken Information

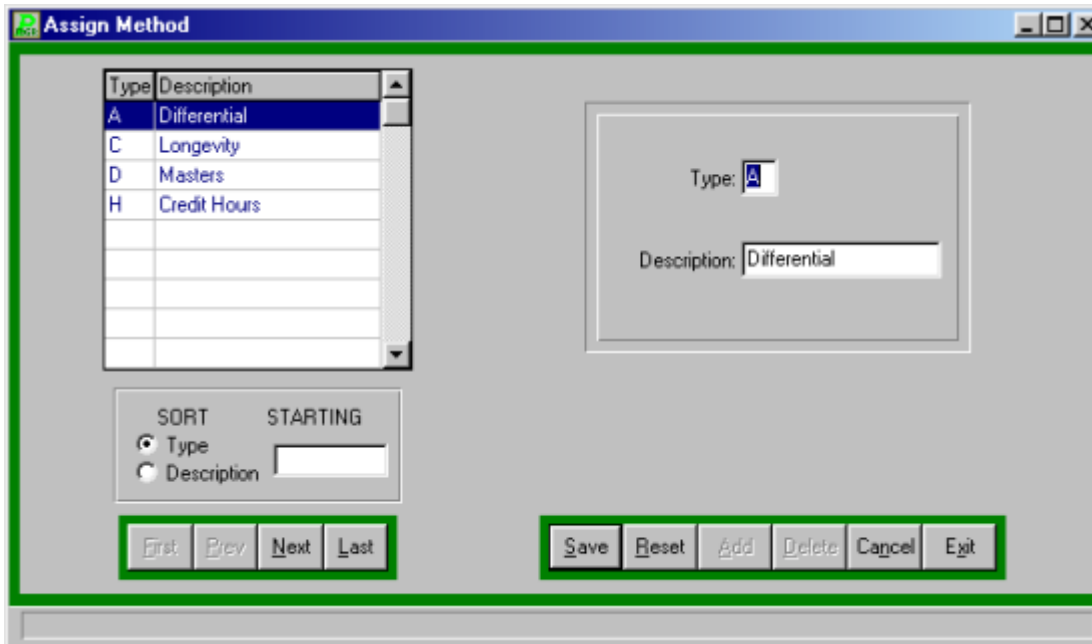
Units Taken:  Taken Date:

Select with Mouse or Use Up/Down keys.

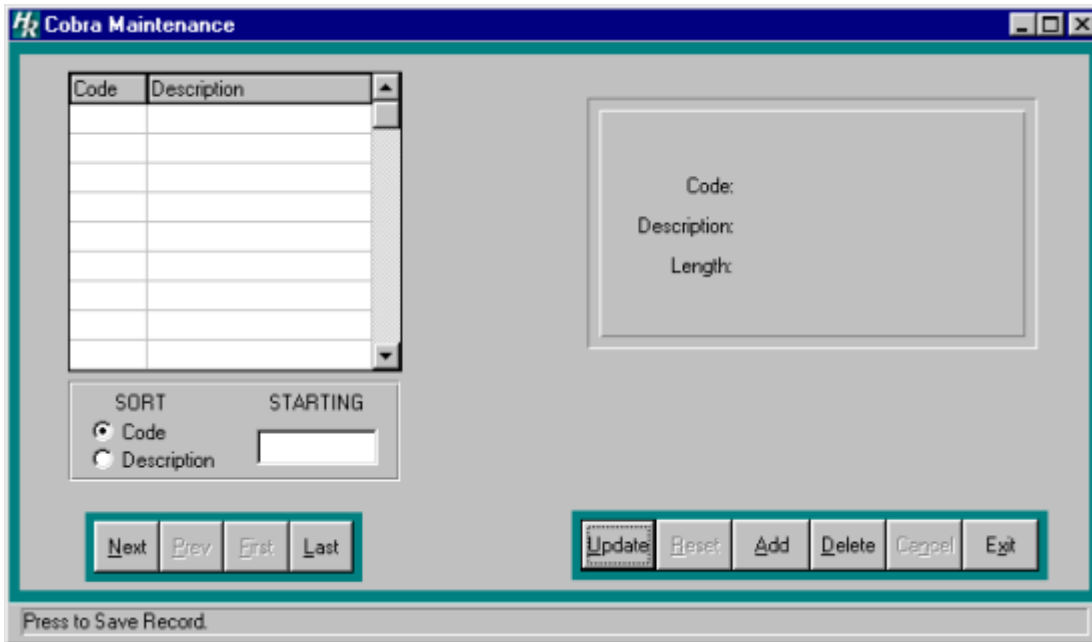
# Custom Utilities



# Assignment Method



# Cobra Utility



# Appointment

The screenshot shows the 'Employee Maintenance' application window. The 'Appointment' tab is active, displaying a table of 'Employee Appointments' and a form for editing the selected appointment. The table shows one appointment for employee TCH24, starting on 07/01/99 and ending on 06/30/00, with a total entitlement of 38,000.00 and a period pay of 1,583.33. The form below the table contains fields for Employee Type (TCH24), Method (C), Overall FTE % (100.00), Start Date (07/01/99), End Date (06/30/00), Board Date (/ /), Month Per Year (10.0), Increment Date (07/01), Standard Hours (6.50), and Retire System (TRS). An 'Appointment Summary' box on the right displays Entitlement: 38,000.00, Period Pay: 1,583.33, Daily Rate: 190.00, and Hourly Rate: 29.23. Navigation buttons (Next, Prev, First, Last) and action buttons (Save, Reset, Add, Delete, Cancel, Notes, Exit) are located at the bottom of the form area.

Employee Type	Start Date	End Date	Method	Overall FTE %	Total Entitlement	Period Pay
TCH24	07/01/99	06/30/00	C	100.00	38,000.00	1,583.33

2654 Public, John Q. 123-45-6777

Employee Type: TCH24 Start Date: 07/01/99  
Method: C End Date: 06/30/00 # Checks: 24  
Overall FTE %: 100.00 Board Date: / /  
Month Per Year: 10.0 Increment Date: 07/01  
Standard Hours: 6.50 Retire System: TRS

Appointment Summary  
Entitlement: 38,000.00  
Period Pay 1,583.33  
Daily Rate 190.00  
Hourly Rate 29.23

Next Prev First Last Save Reset Add Delete Cancel Notes Exit

Press to Lookup Employee Types.

# Position

Employee Maintenance

Employee Earnings

Appointment

Position

Earnings

Other Earnings

Account

Employee Position							
Position	Bldg	Start Date	End Date	Total FTE	Certification Code	CS Code	Tenure Code
HS TCH	J	07/01/99	06/30/00	100.00	ENGLISH		ENG

2654 Public, John Q.

Position Code: HS TCH    Start Date: 07/01/99    Certification Code: ENGLISH

Bldg: J    End Date: 06/30/00    Tenure Code: ENG

Percentage: 100.00    Department: ENG    Jarema Eligible:

Save    Reset    Add    Delete    Cancel

Press to Lookup Position Code.



# Earnings

**Employee Maintenance**

Employee | Earnings

Appointment  
Position  
Earnings  
Other Earnings  
Account

Employee Contractual Earnings								
Code	Step	Level	Start Date	Base Contract	Days	# of Checks	FTE Amount	Period Pay
Contract	1.00	1	07/01/99	38,000.00	200.0	24.0	38,000.00	1,583.33

2654 Public, John Q. 123-45-6777 TCH24 FTE Amount: 38,000.00

Code: Contract # of Checks: 24.0 Step: 1.00 Daily Rate: 190.000

Start Date: 07/01/99 Working Days: 200.0 Level: 1 Hourly Rate: 29.231

End Date: 06/30/00 Hrs Per Day: 6.50 Base Contract: 38,000.00 Entitlement: 38,000.00

Renewable:  Include In -> Contract:  Period Pay:  Retirement:  Period Pay: 1,583.33

Save Reset Add Delete Cancel

Include in Period Pay?

# Other Earnings

**Employee Maintenance**

Employee | Earnings

Appointment  
Position  
Earnings  
Other Earnings  
Account

Employee Other Earnings									
Code	Step	Level	Start Date	Base Contract	Days	# of Checks	FTE Amount	Period Pay	
Longevity	0.00	2	07/01/99	2,000.00	200.0	24.0	2,000.00	83.33	

2654 Public, John Q. 123-45-6777 TCH24

Type: Longevity

Start Date: 07/01/99 # of Checks: 24.0 Step: 0.00 FTE Amount: 2,000.00

End date: 06/30/00 Working Days: 200.0 Level: 2 Period Pay: 83.33

Amount: 2,000.00 Entitle: 2,000.00

Renewable  Include Contract  Period Pay  Include Retirement  Daily Rate: 10.00

Hourly Rate: 1.54

Save Reset Add Delete Cancel

Include in Contract?

# Account

**Employee Maintenance**

Employee | Earnings

Appointment  
Position  
Earnings  
Other Earnings  
Account

Account	%	Amt/Chk	Earn Limit	FTD Earn	Balance Rem
A12401500A0	100.00	1,666.66	40,000.00	0.00	40,000.00

2654    Public, John Q.    123-45-6777

Account:

Percent:

Earn Limit:     FTD Earn:

Amt/Chk:     Remaining:

Press to Lookup Account Codes.

# Employee's Benefit's Waived

**Employee's With WAIVED Benefit's Listing**

Select Employee Type  
 Select All Employee Types

Type	Description
ADMCO	CENTRAL ADMINISTRATORS
ADMIN	PRINCIPALS/ DIRECTORS & ASS
BD10A	10 MOS BUS DVR AFTER 5/21/9
BD10B	10 MOS BUS DVR BEFORE 5/21/
BD12A	12 MOS BUS DVR AFTER 5/21/9
BD12B	12 MOS BUS DVR BEFORE 5/21/
CHR20	CHAIRPERSONS- 20 CHECKS
CHR24	CHAIRPERSONS- 24 CHECKS
CL10A	10 MOS CLERICAL AFTR 5/21/96
CL10B	10 MOS CLERICAL BEFORE 5/21/
CL11A	10.5 MOS CLERICAL AFTR 5/21/
CL11B	10.5 MOS CLERICAL BEFR 5/21/

Select Insurance Type  
 Select All Coverage Types

Provider	Cover Type
waived	MAJOR MED
waived	HEALTH
waived	LIFE
waived	DISABILITY
waived	OTHER

OK Cancel

Select with Mouse or Use Up/Down keys.

# Global Benefit Utility

**Global Benefit Utility**

Select Employee Type  
 Select All Employee Types

Type	Description
ADMCN	CONSULTANT ADMINISTRATOR
ADMDO	DO ADMINISTRATORS
ADMIN	ADMINISTRATORS
AID23	TCHR AIDES 23 PAYS
AIDE	Teacher's Aide
AIDEH	TEACHER AIDES - HOURLY
AIDES	TEACHER AIDES - SALARY
CAFEH	CAFETERIA-HOURLY
CAFES	CAFETERIA-SALARY
COACH	COACHES
DIREC	DIRECTORS
EXEM	INT AUDITOR

Select a Provider  
 Provider: Empire BC/BS Health

Coverage Type:  Family  Individual  Spousal

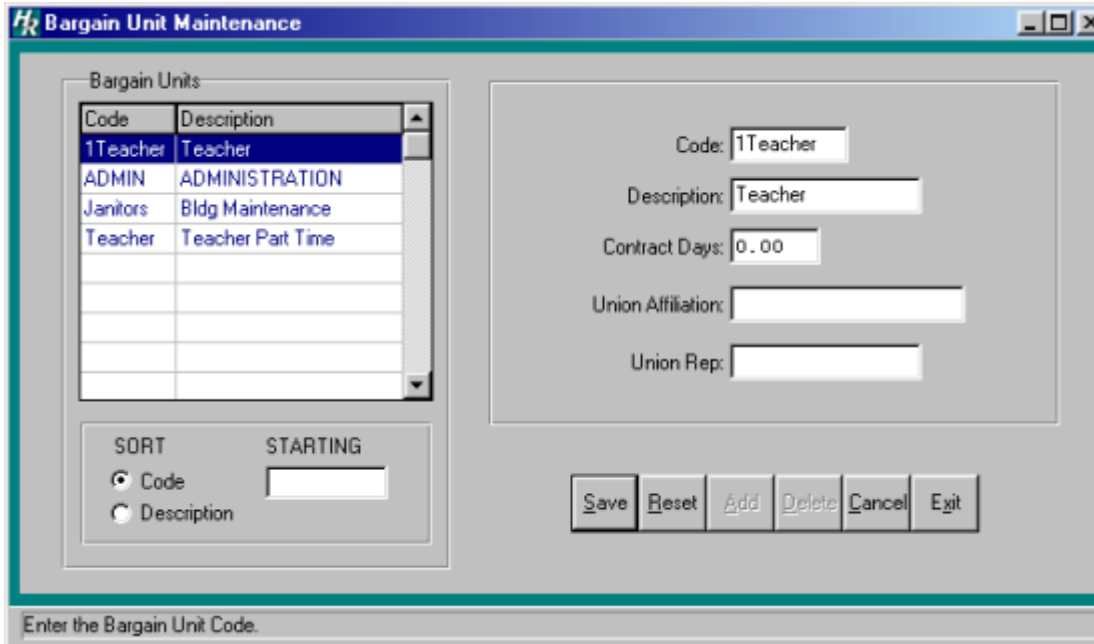
\*\*\*\*\* COVERAGE INFORMATION \*\*\*\*\*

Coverage	Ded Code	TL	Cost	\$/%	Old Emp Cost	New Emp Cost
Family	BC17FAM*	1,200.00	\$	775.00	0.00	0.00
Individual		0.00	\$	0.00	0.00	0.00
Spousal		0.00	\$	0.00	0.00	0.00

OK Cancel

Press to Select All Employee Types.

# Bargain Unit Maintenance



Code	Description
1Teacher	Teacher
ADMIN	ADMINISTRATION
Janitors	Bldg Maintenance
Teacher	Teacher Part Time

Code:

Description:

Contract Days:

Union Affiliation:

Union Rep:

Save Reset Add Delete Cancel Exit

Enter the Bargain Unit Code.

