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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

Th 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:

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

Name	Activate the NAME radio button (in the Sort box) and type in the first few characters of the employee's name.
Number	Activate the NUMBER radio button (in the Sort box) and type in the number.
SSN	Activate the SOCIAL SECURITY NUMBER radio button (in the Sort box) and type in the employee's number.
Status	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.

<u>Editing the calendar</u>

- Click the date desired from the calendar.

- Enter the new information in the Absent Maintenance dialog box.

- Click OK to lock in the changes.

<u>Exiting Calendar</u>

- 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 in 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 in formation 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 form 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.

<u>Editing an Retirement entry</u>

- 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.

<u>Exiting from Retirement</u>

- 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.

<u>Add a course</u>

- 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.

<u>Editing an education entry</u>

- 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.

<u>Deleting an education entry</u>

- 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 an 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.

<u>Adding Other Earnings</u>

- 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

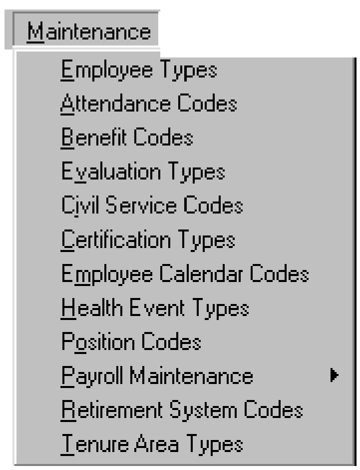
Maintenance

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.

<u>The drop-down menu</u>

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.

<u>Adding a Salary Schedule</u>

- 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.

<u>Editing/Changing a Salary Schedule</u>

- 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.

<u>Removing a Salary Schedule</u>

- 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.

HEALTH Sorts the listing by having it display only the health insurance type in the listing

DENTAL Sorts the listing by having it display only the dental insurance type in the listing

LIFE Sorts the listing by having it display only the life insurance type in the listing

DISABILITY Sorts the listing by having it display only the disability insurance in the listing

MAJOR MEDICAL 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.

Code 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.

Description 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

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

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

Type 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 lick 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.

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

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

City 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.

<u>Adding a Tax Table</u>

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.

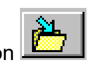
- Select Position Report.
- Select the positions to be included.
- Select report type:

  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  .

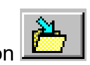
Attendance Analysis Reports

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  .

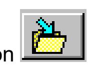
Monthly Attendance Report

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:

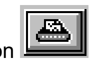
1) Print the report by clicking the print icon  or

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:

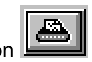
    1) Print the report by clicking the print icon  or

    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:

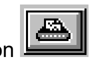
3) Print the report by clicking the print icon  or

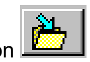
4) Saving to a file by clicking the save icon .

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:

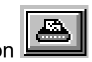
  Civil Service Report…

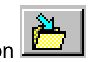
  Civil Service Payroll Journal…

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  .

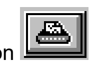
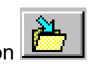
Employee Directory

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

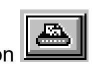
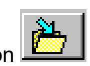
- Under the Files tab, each employee type will be displayed on the left side of the screen. The right side of the screen will display the detail of the attendance days. For a screen image please click Files Folder or Print Folder .

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

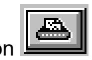
- Select the report type Summary or Detail.
- If the detail is selected, select to have the report list the details by building or employee name.
- Click PRINT to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

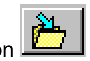
1) Print the report by clicking the print icon  or
2) Saving to a file by clicking the save icon  .

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:

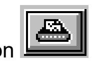
    1) Print the report by clicking the print icon  or

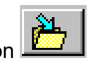
    2) Saving to a file by clicking the save icon  .

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:

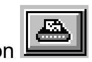
1) Print the report by clicking the print icon  or

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:

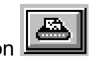
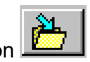
0 The Name Listing by Employee Number and Name Listing by Name Reports provide grand totals of the number of employees reported. An employee who has multiple appointments displays multiple times but is only counted one time in the report grand total.

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.

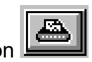
- Select Personnel Files.
- Select the report criteria using the standard report interface.
- Click OK to run the report. The report will be displayed on screen in the report viewer for user verification. If the report is correct the user can:

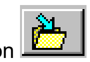
1) Print the report by clicking the print icon  or
2) Saving to a file by clicking the save icon  .

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  .

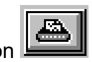
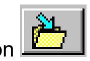
Human Resources Tips:

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:

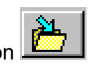
    1) Print the report by clicking the print icon  or

    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.

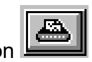
- Select Pending Evaluations
- Select the report criteria using the standard report interface
- Select the sorting method and press TAB
- Select the desired page break and press TAB
- Select the option for all employees and press TAB
- Select whether the report should include evaluations or observations.
- 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:

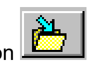
  Year End Salary & Contracts…

  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:

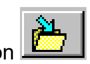
0 For NEGOTIATIONS MANAGER users, if you have created salary schedules for the selected groups and defined them in Human Resources for use by the employee type, the generate process will automatically enter the contractual salary for the new fiscal year into the temporary salary file. It will also note 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 staring 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 Inforamtion. 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

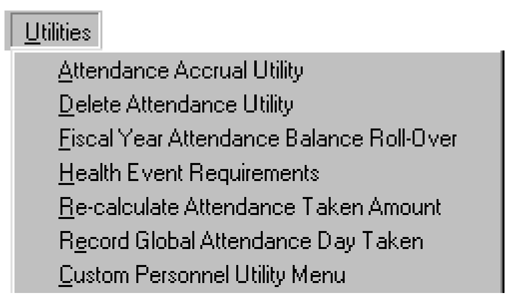
Health Event Requirements

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.

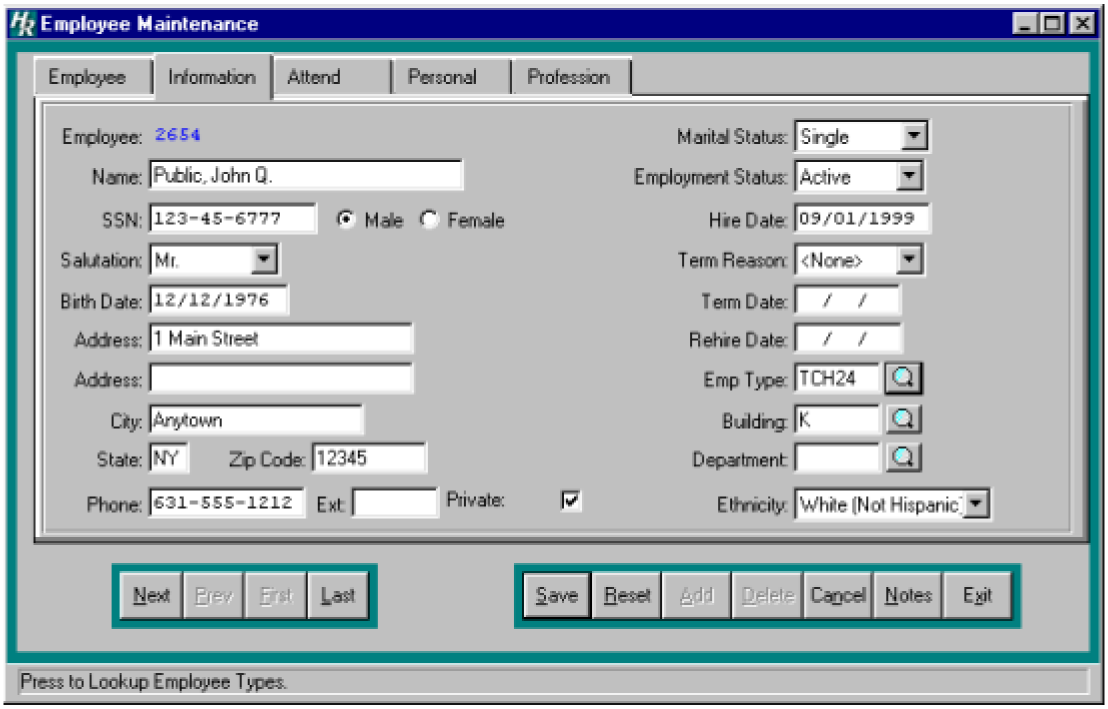
The system automatically makes global changes based on those employees who meet the specified criteria. The Employee Benefits window in the HUMAN RESOURCES Employee Information Maintenance Personal folder reflects the new Employee Portion and Total Cost, as well as the adjusted Employer Portion. The 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

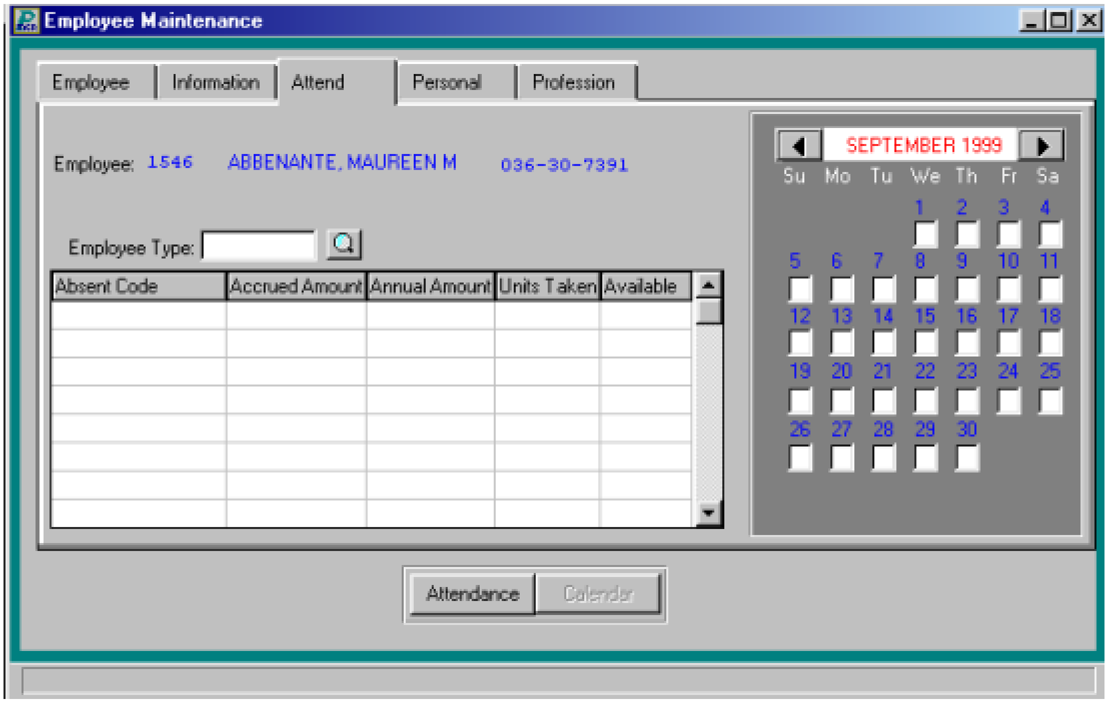
The Custom Utility Menu allows each user to call upon special custom utilities provided to the user by **FINANCE MANAGER**. For a screen image please click Custom Utilities.

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

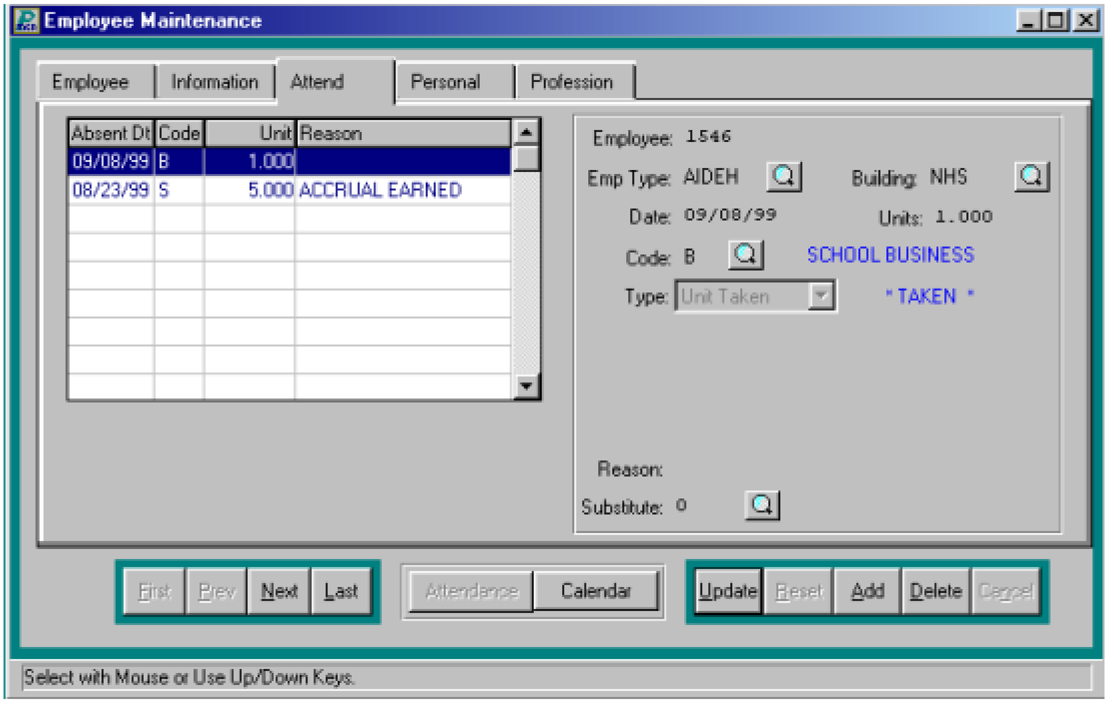
Employee Information



Calendar Information

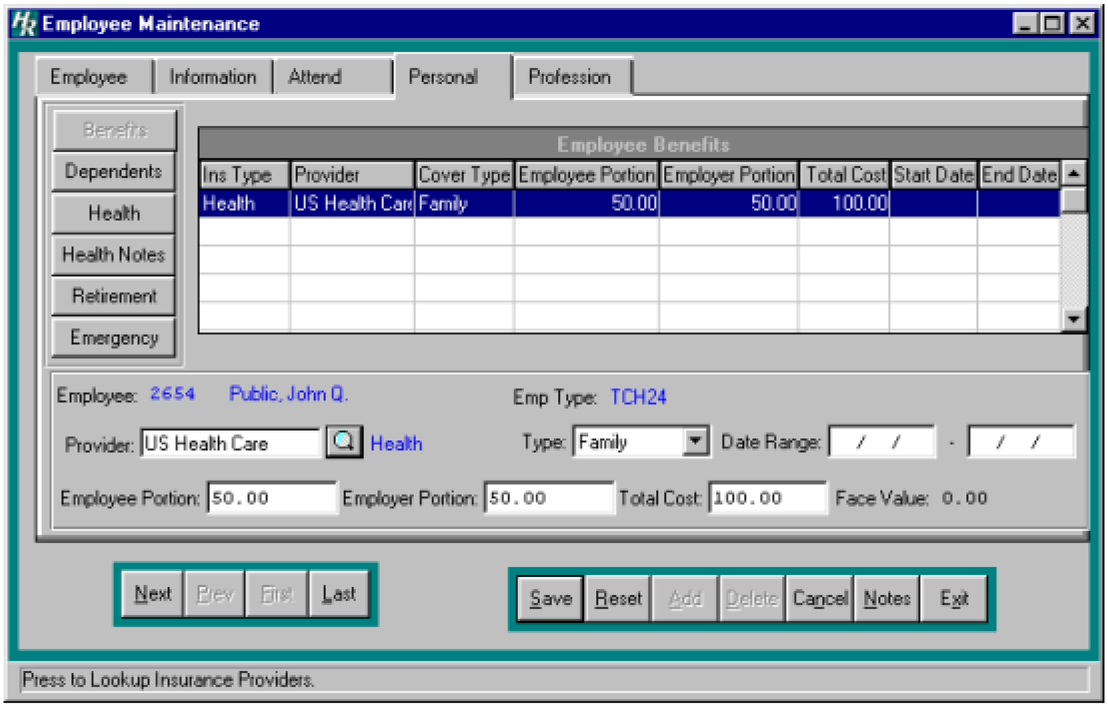


Attendance

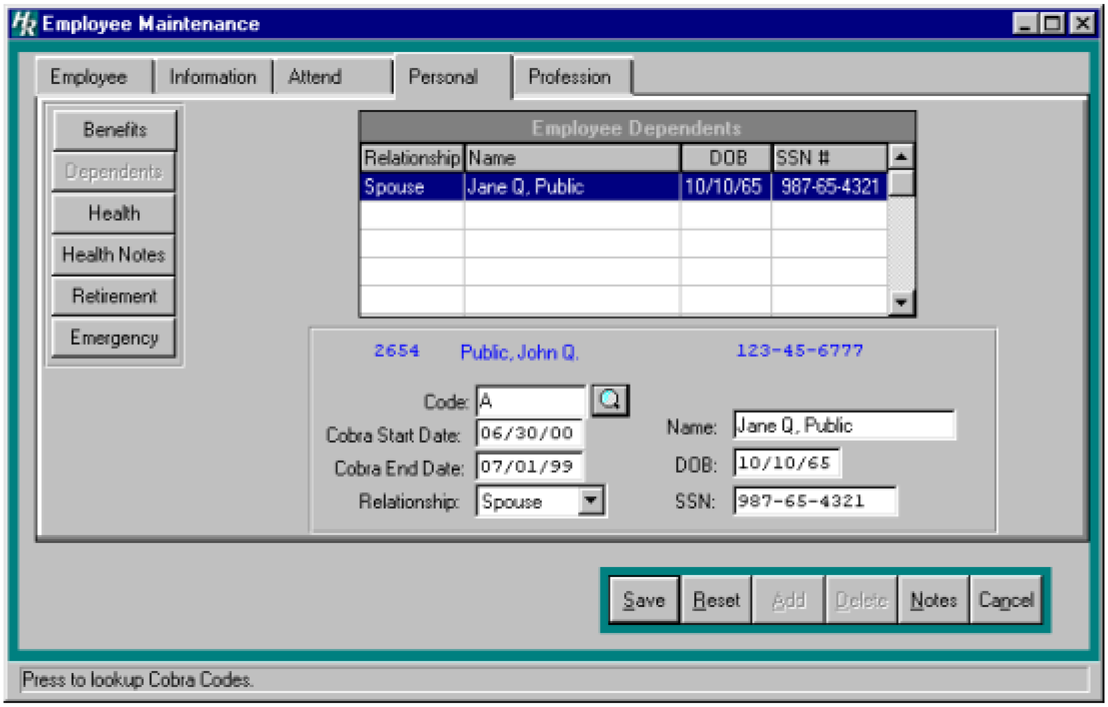


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Absent Dt Code Unit Reason
09/08/99 B 1.000
08/23/99 S 5.000 ACCRUAL EARNED
Employee: 1546
Emp Type: AIDEH
Building: NHS
Date: 09/08/99
Units: 1.000
Code: B
SCHOOL BUSINESS
Type: Unit Taken
* TAKEN *
Reason:
Substitute: 0
First
Prev
Next
Last
Attendance
Calendar
Update
Reset
Add
Delete
Cancel
Select with Mouse or Use Up/Down Keys.

Benefit Information

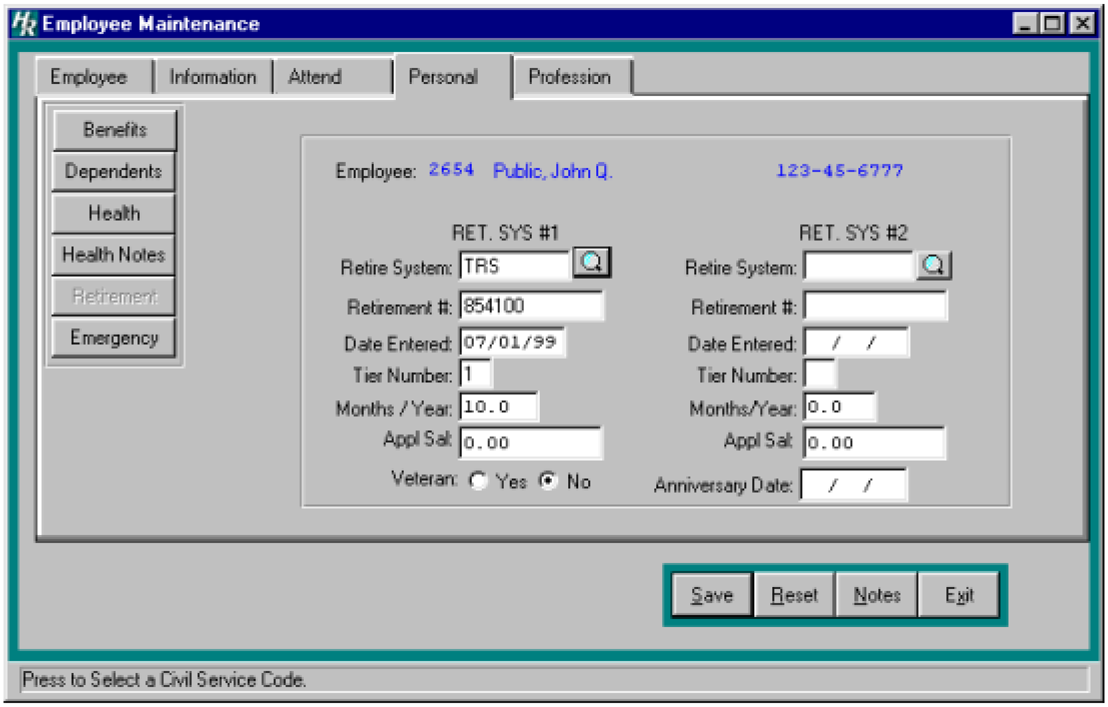


Dependents

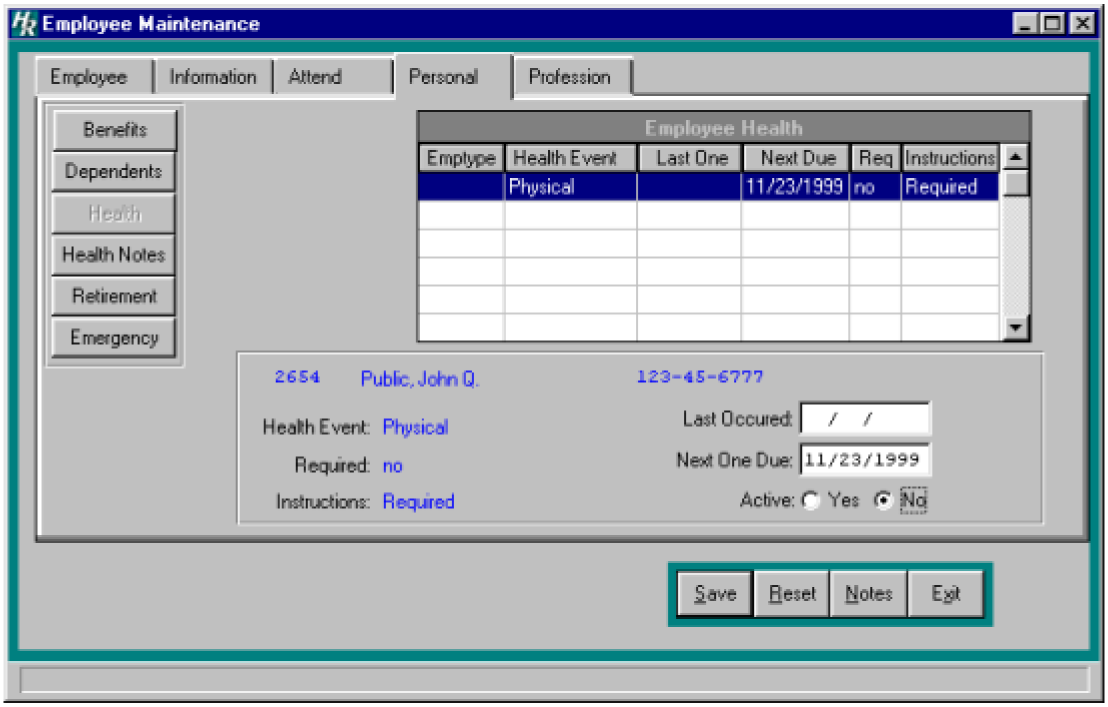


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Benefits
Dependents
Health
Health Notes
Retirement
Emergency
Employee Dependents
Relationship
Name
DOB
SSN #
Spouse
Jane Q, Public
10/10/65
987-65-4321
2654
Public, John Q.
123-45-6777
Code: A
Cobra Start Date: 06/30/00
Cobra End Date: 07/01/99
Relationship: Spouse
Name: Jane Q, Public
DOB: 10/10/65
SSN: 987-65-4321
Save
Reset
Add
Delete
Notes
Cancel
Press to lookup Cobra Codes.

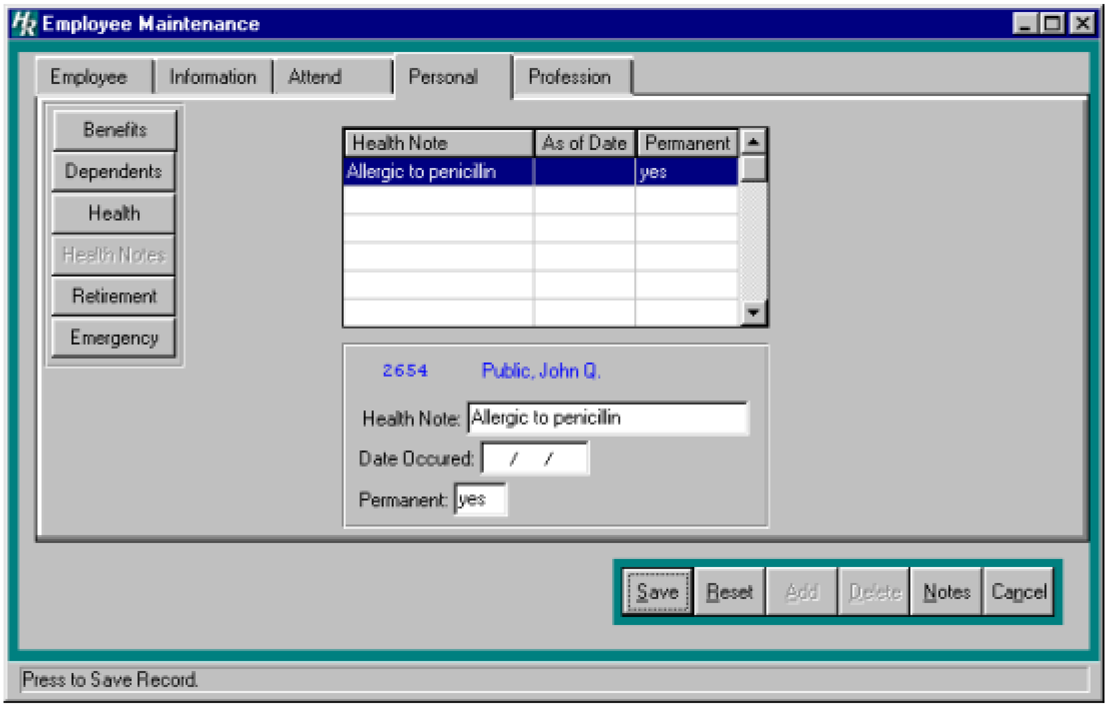
Retirement Information



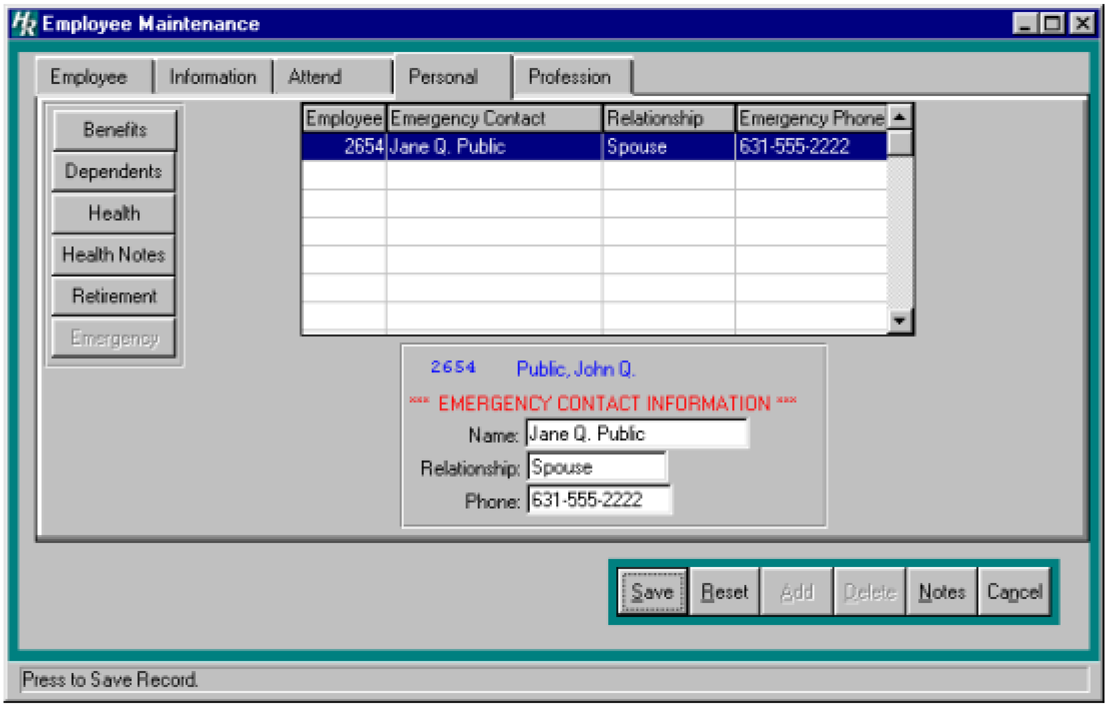
Health


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Benefits
Dependents
Health
Health Notes
Retirement
Emergency
Employee Health
Emptype
Health Event
Last One
Next Due
Req
Instructions
Physical
11/23/1999
no
Required
2654
Public, John Q.
123-45-6777
Health Event: Physical
Required: no
Instructions: Required
Last Occured: / /
Next One Due: 11/23/1999
Active: Yes No
Save
Reset
Notes
Exit

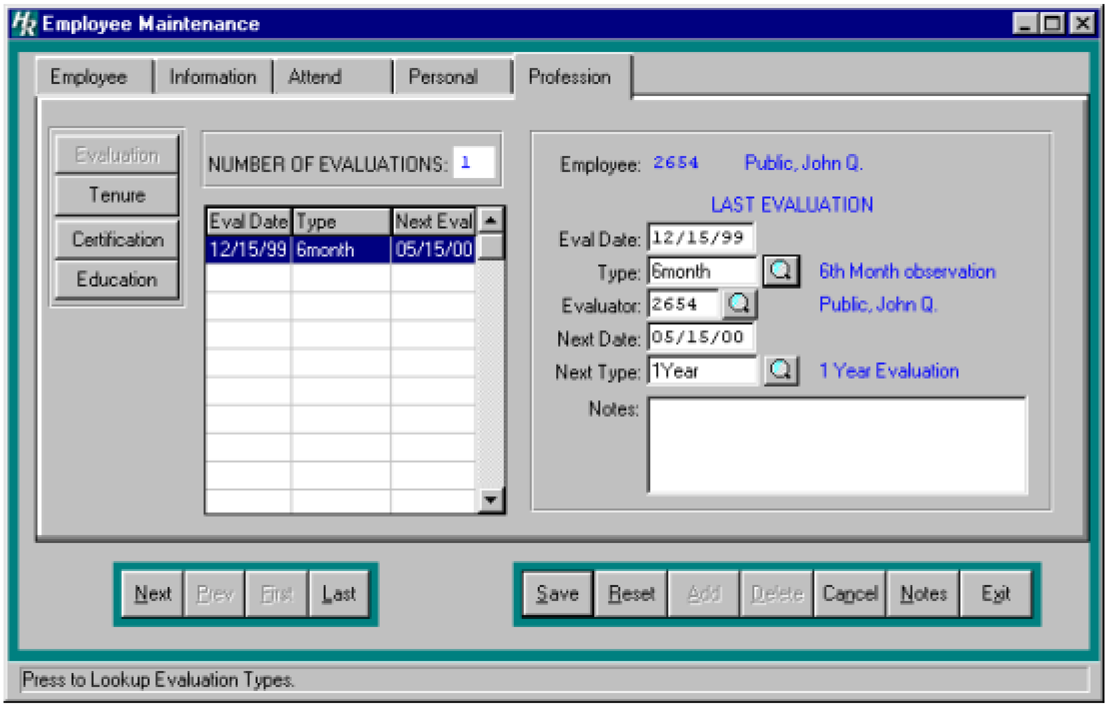
Health Notes



Emergency Contact

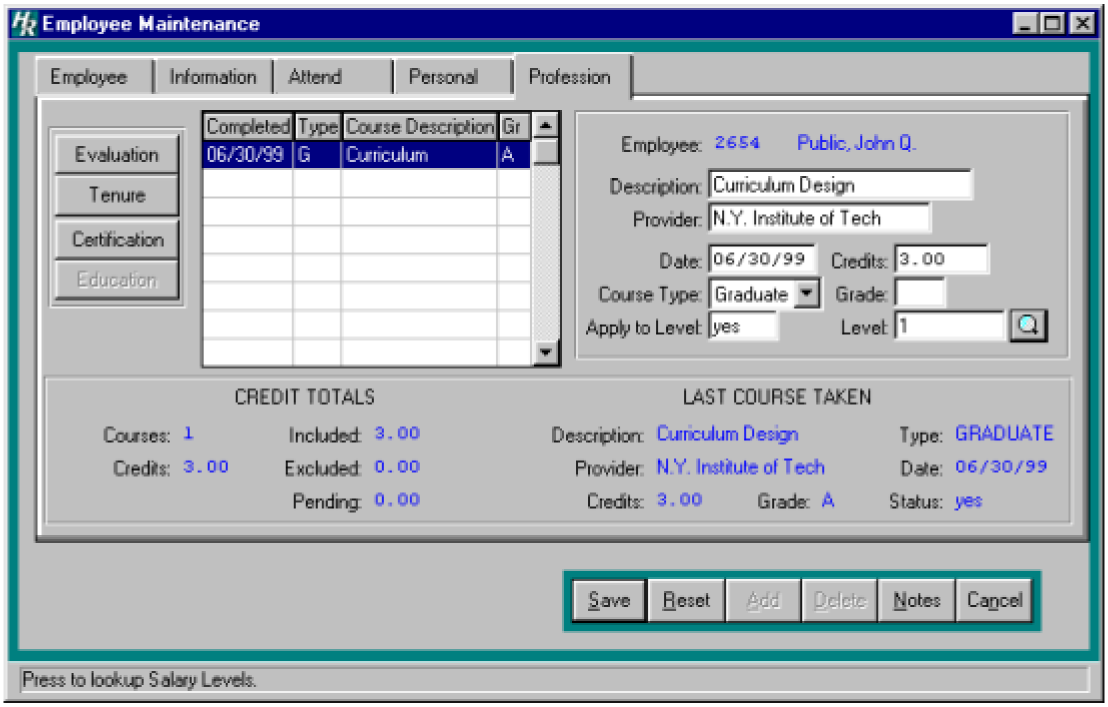


Evaluation

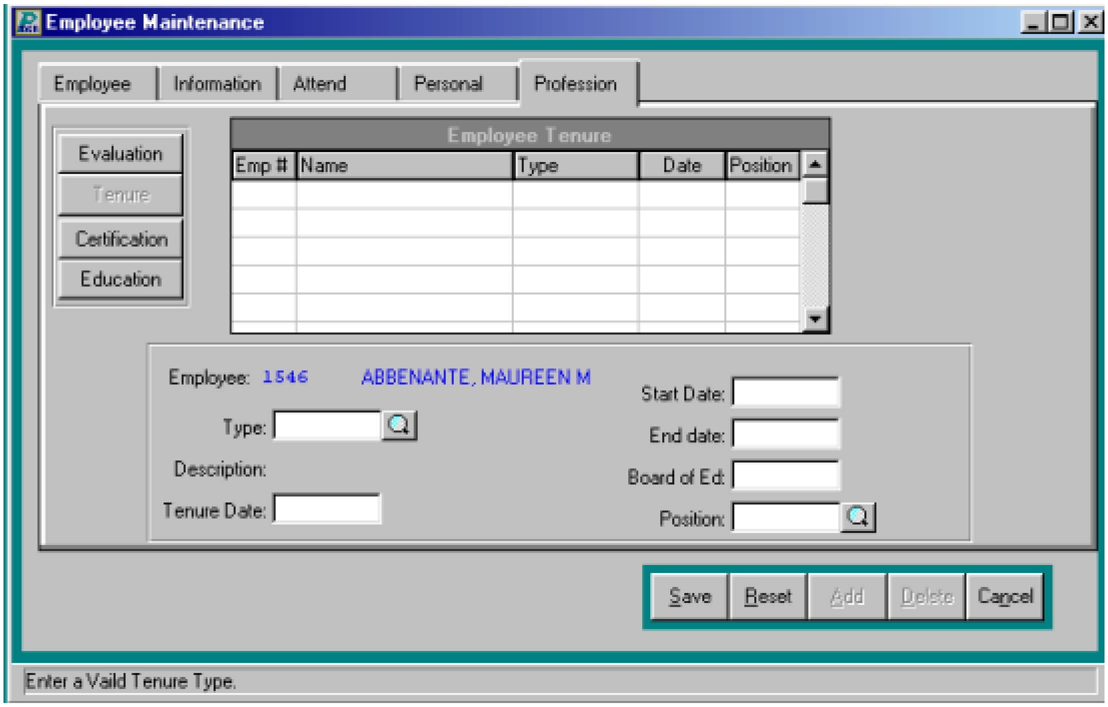


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Evaluation
Tenure
Certification
Education
NUMBER OF EVALUATIONS: 1
Eval Date
Type
Next Eval
12/15/99
6month
05/15/00
Employee: 2654
Public, John Q.
LAST EVALUATION
Eval Date: 12/15/99
Type: 6month
6th Month observation
Evaluator: 2654
Public, John Q.
Next Date: 05/15/00
Next Type: 1Year
1 Year Evaluation
Notes:
Next
Prev
First
Last
Save
Reset
Add
Delete
Cancel
Notes
Exit
Press to Lookup Evaluation Types.

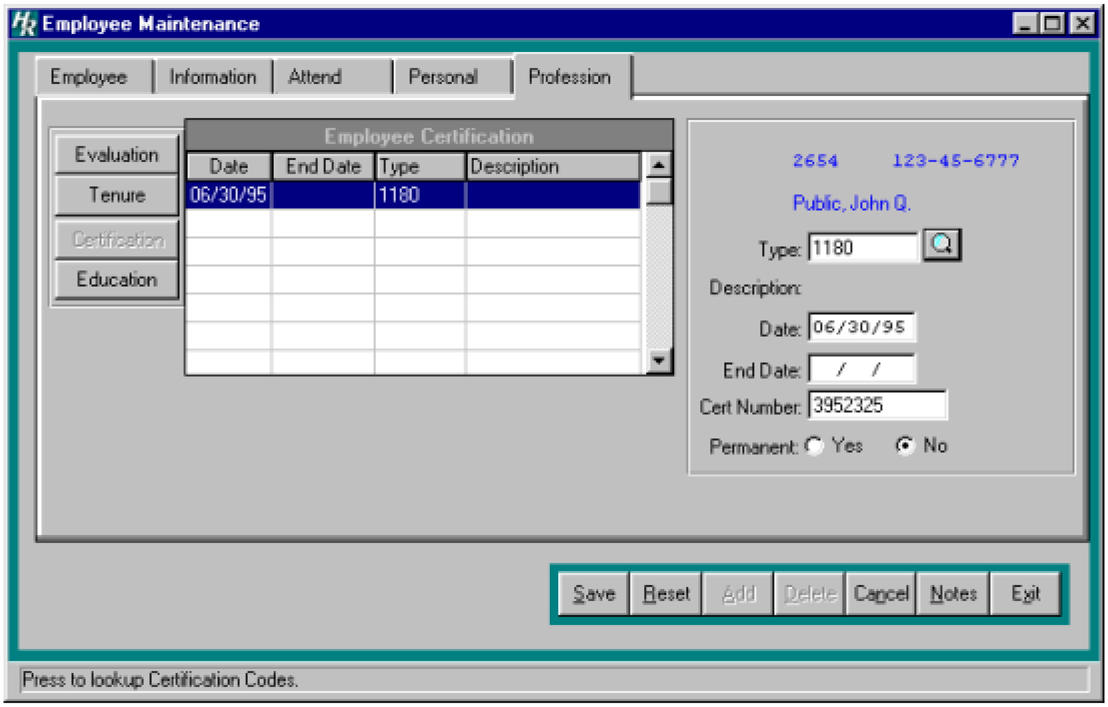
Education


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Evaluation
Tenure
Certification
Education
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
Credits: 3.00
Included: 3.00
Excluded: 0.00
Pending: 0.00
LAST COURSE TAKEN
Description: Curriculum Design
Provider: N.Y. Institute of Tech
Credits: 3.00
Grade: A
Type: GRADUATE
Date: 06/30/99
Status: yes
Save
Reset
Add
Delete
Notes
Cancel
Press to lookup Salary Levels.

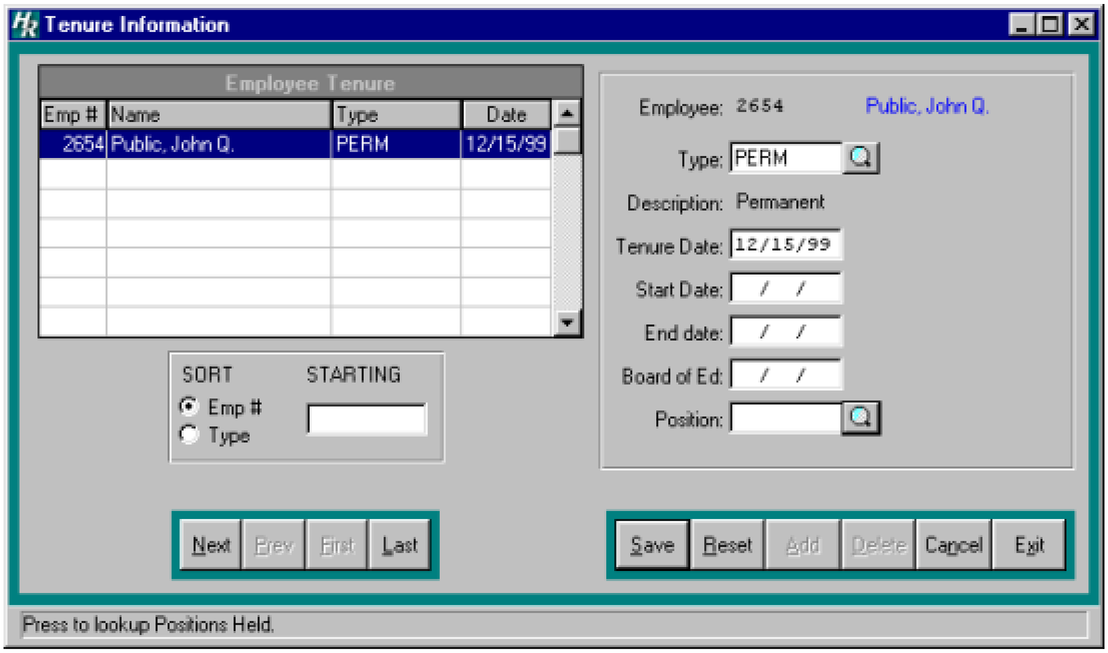
Tenure


Employee Maintenance
Employee
Information
Attend
Personal
Profession
Evaluation
Tenure
Certification
Education
Employee Tenure
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 Vaild Tenure Type.

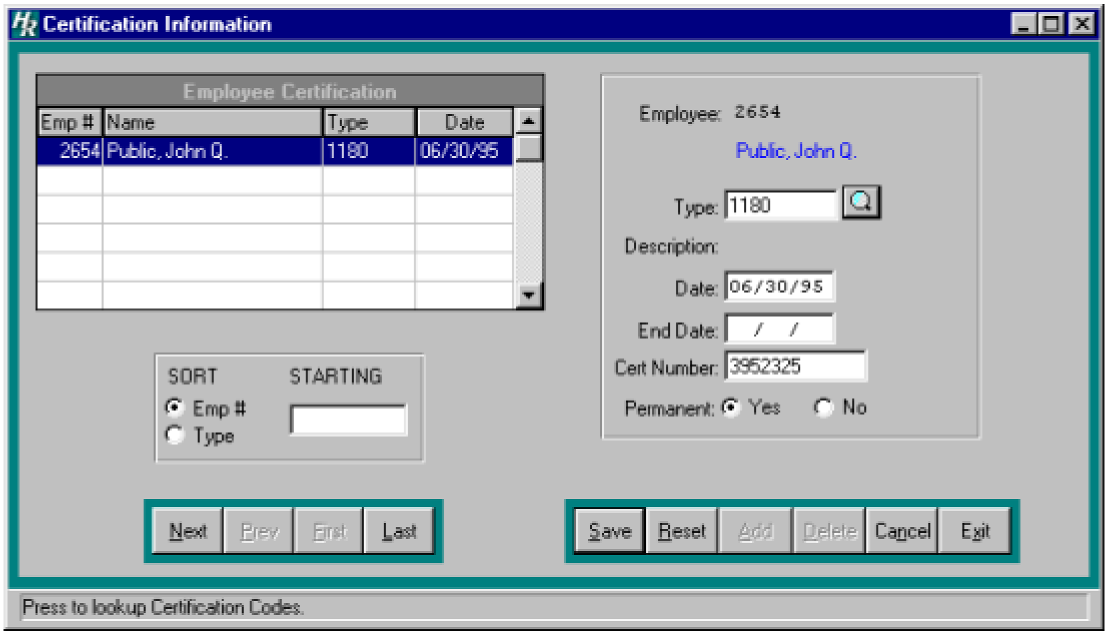
Certification



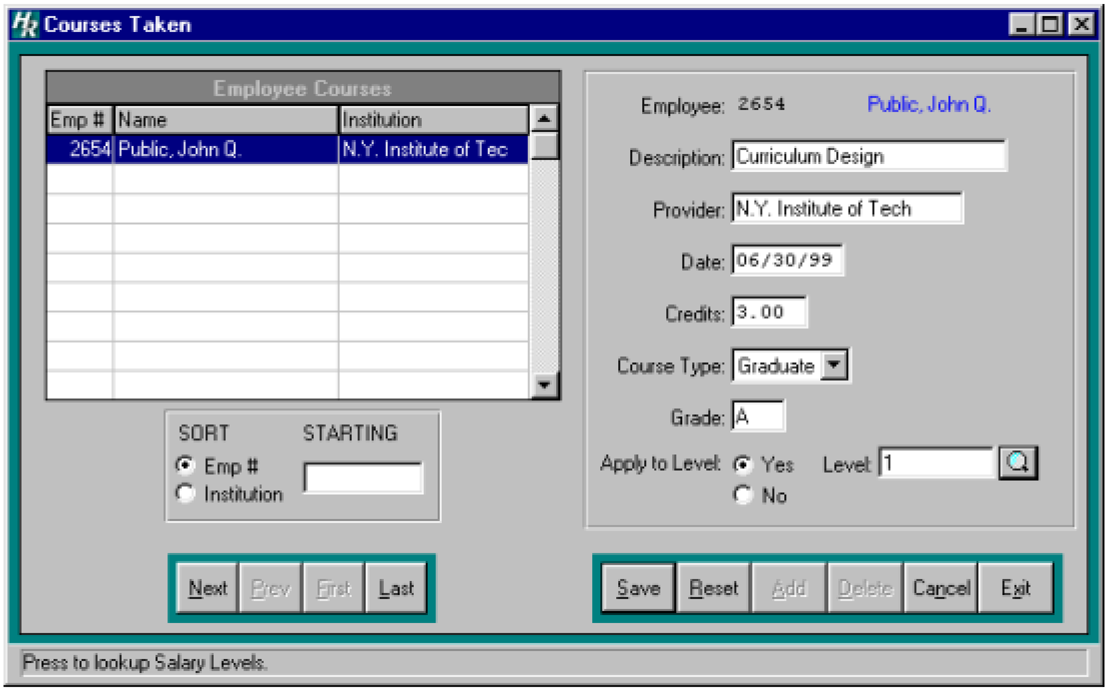
Tenure Information



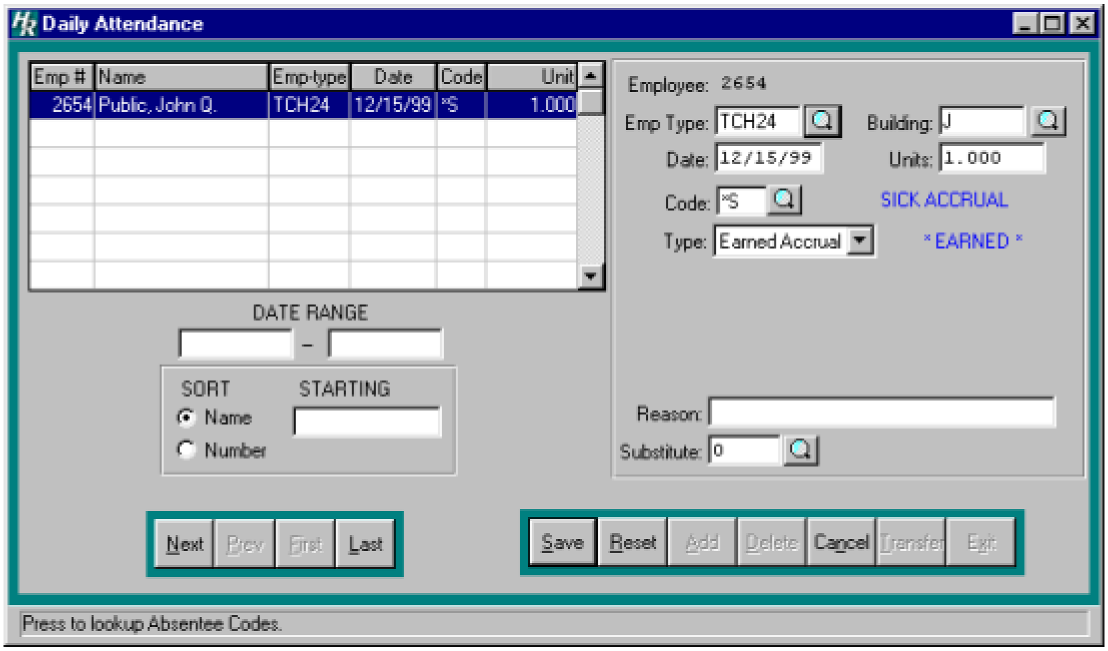
Certification Information



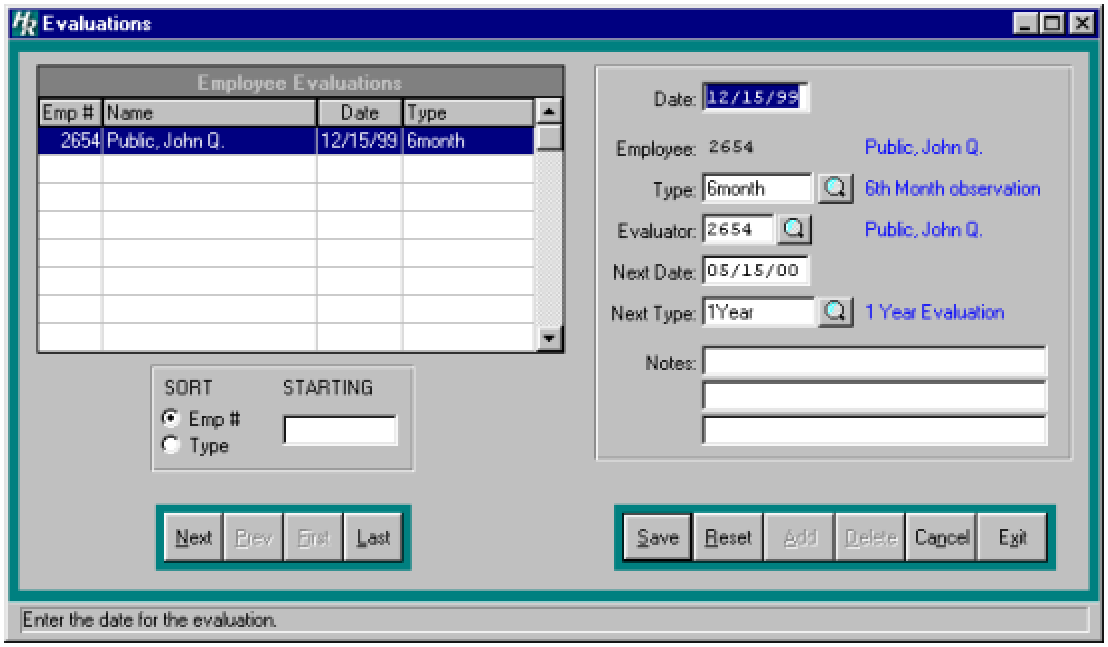
Courses Taken



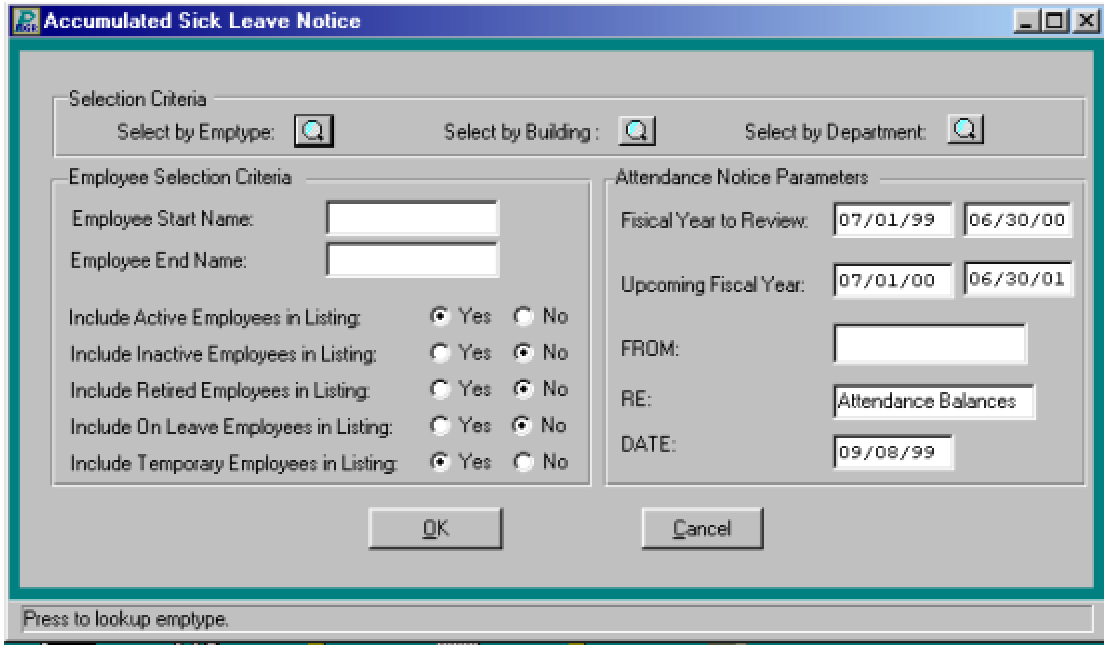
Daily Attendance



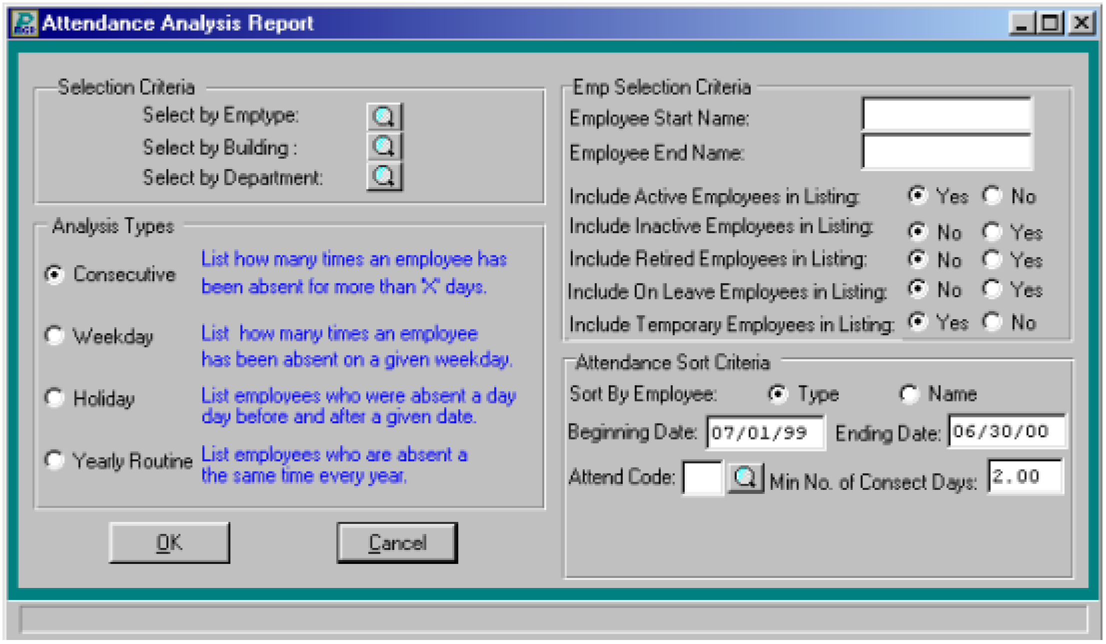
Evaluations



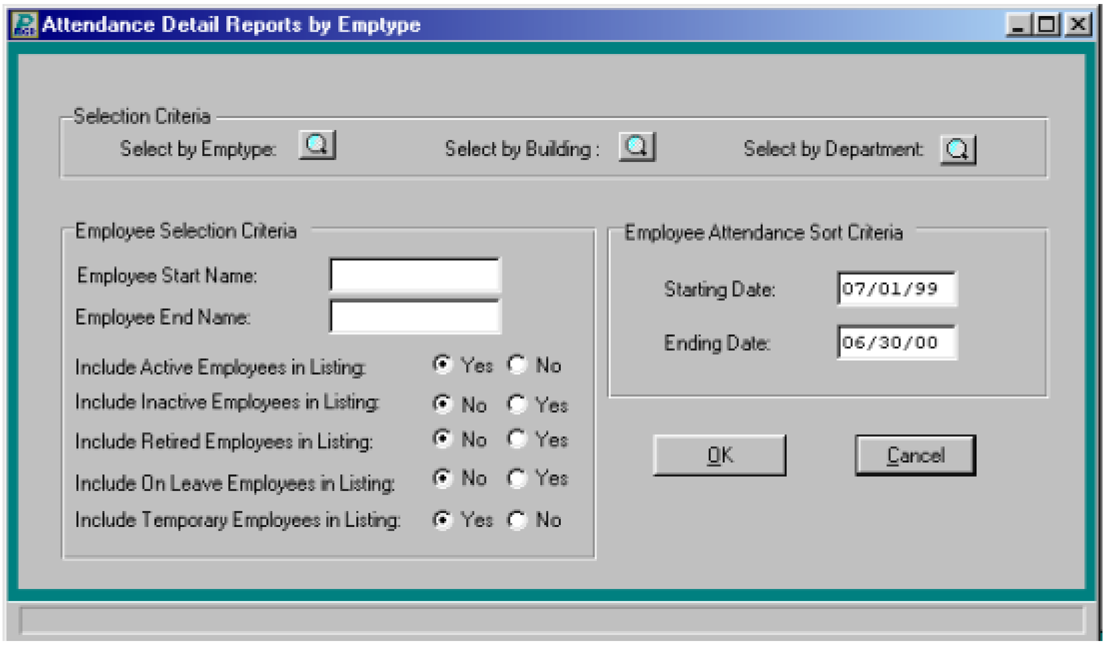
Accumulated Sick Leave Notice



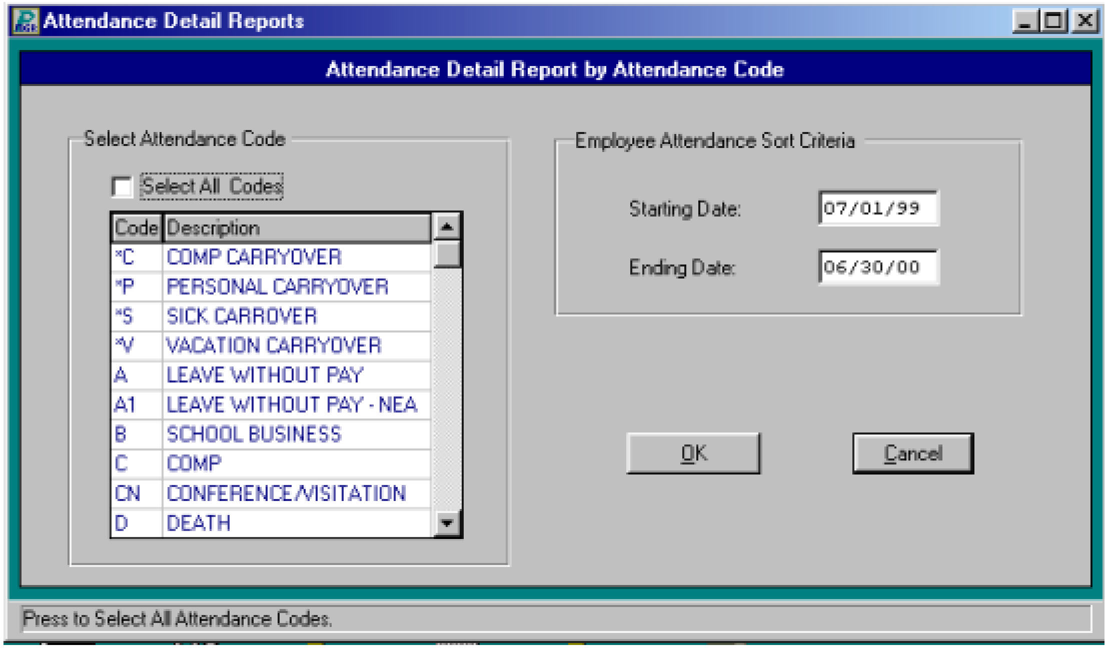
Attendance Analysis Reports



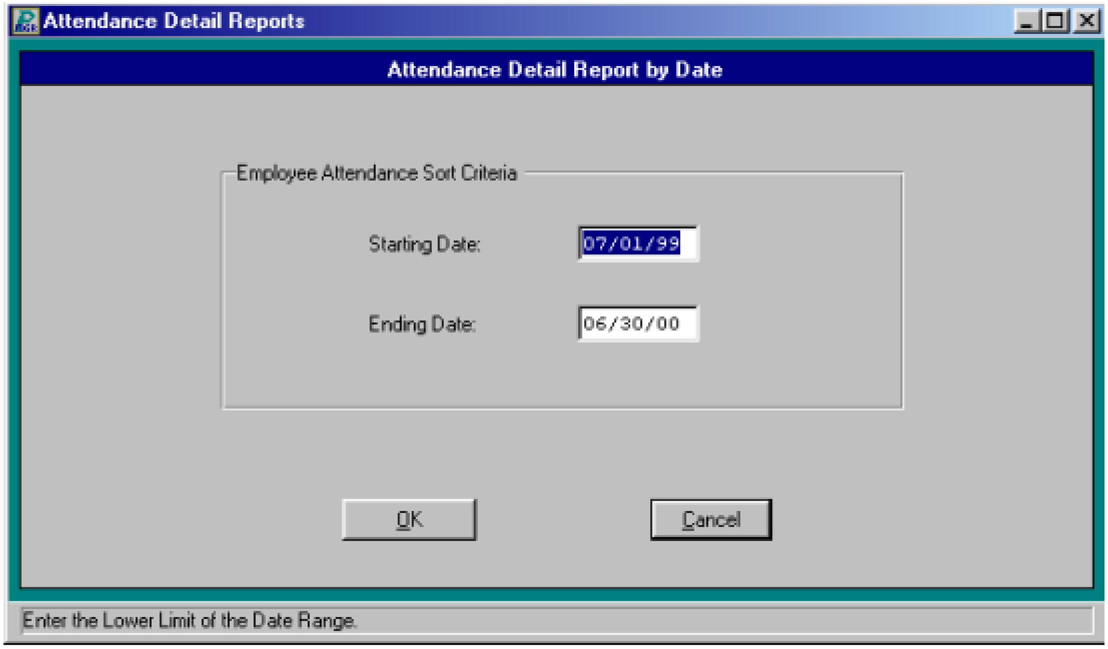
Attendance Detail Report by Employee Type



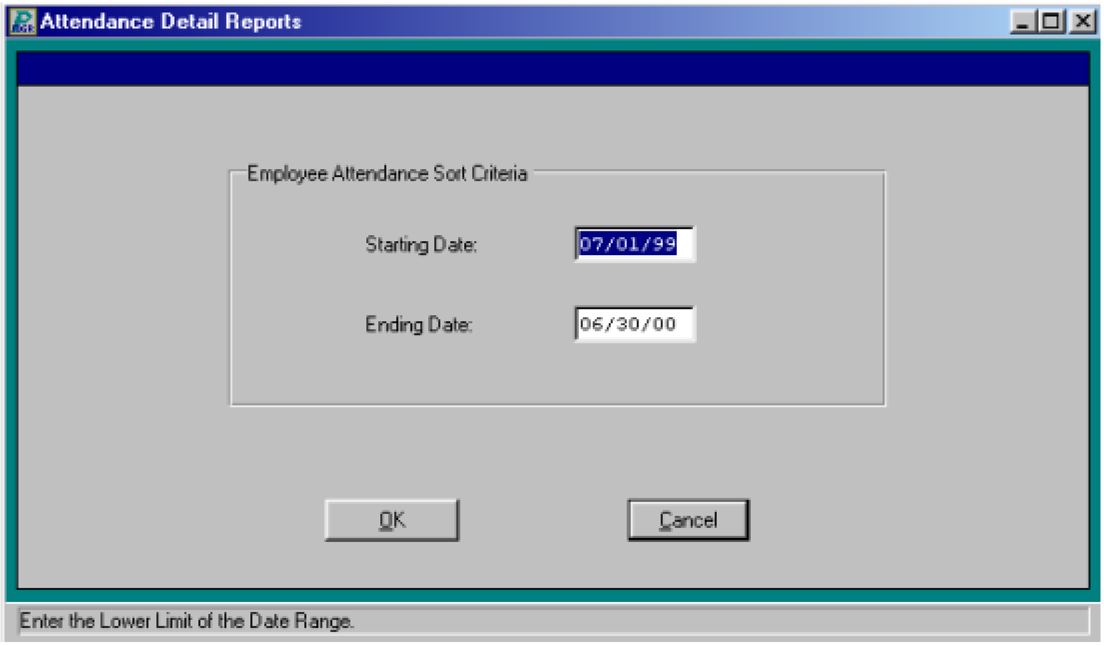
Attendance Detail Report by Attendance Code



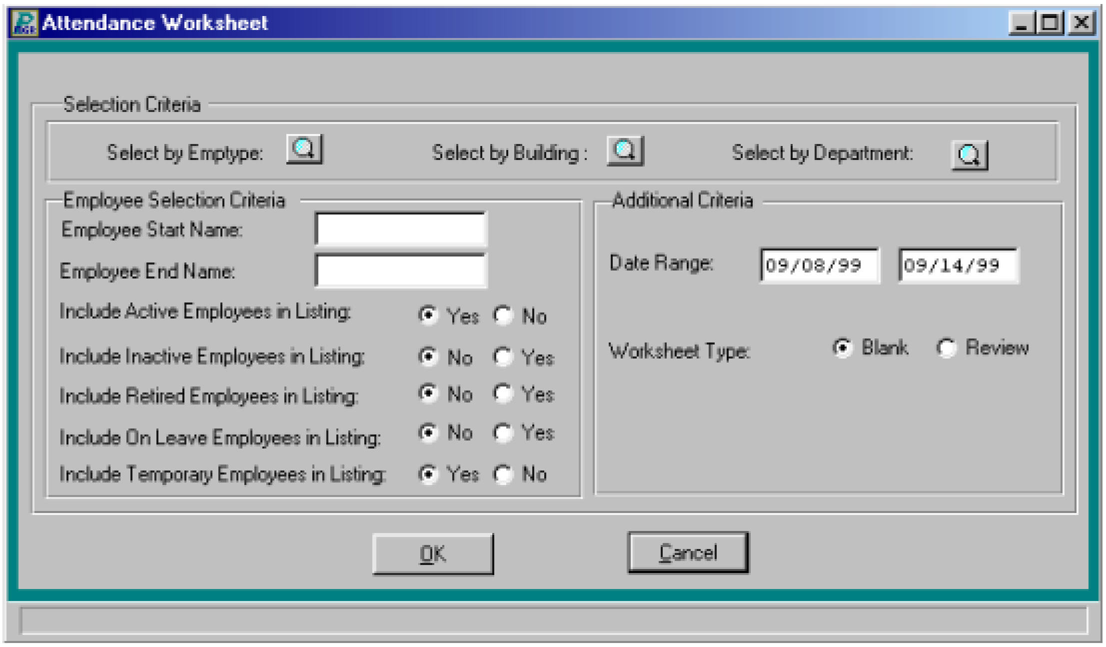
Attendance Detail Report by Date



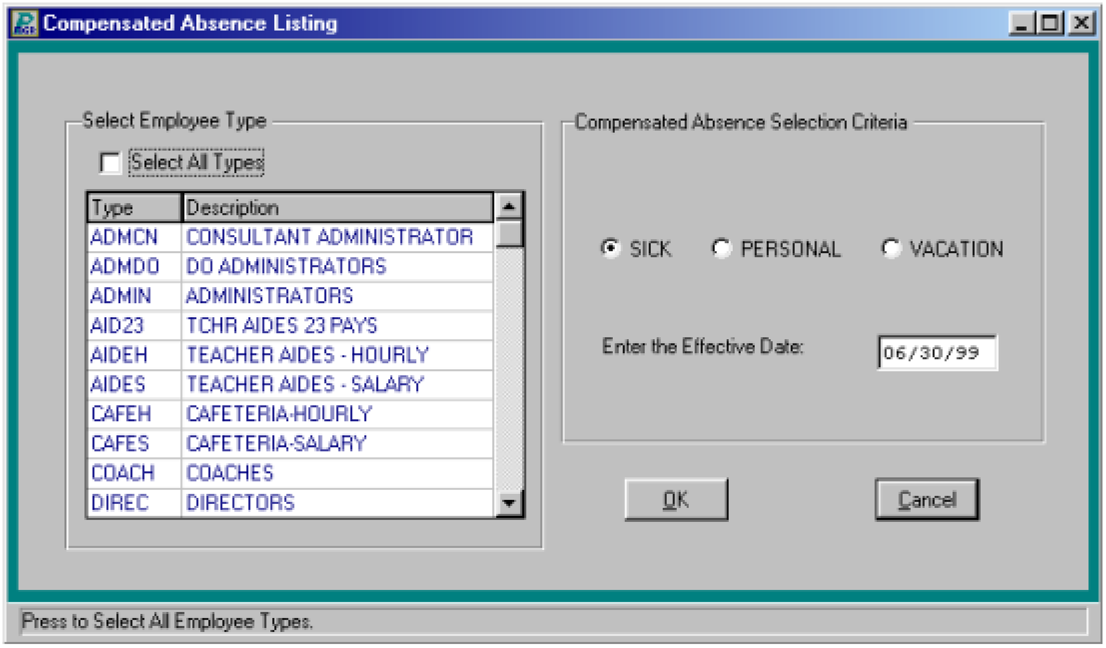
Attendance Detail Report by Name



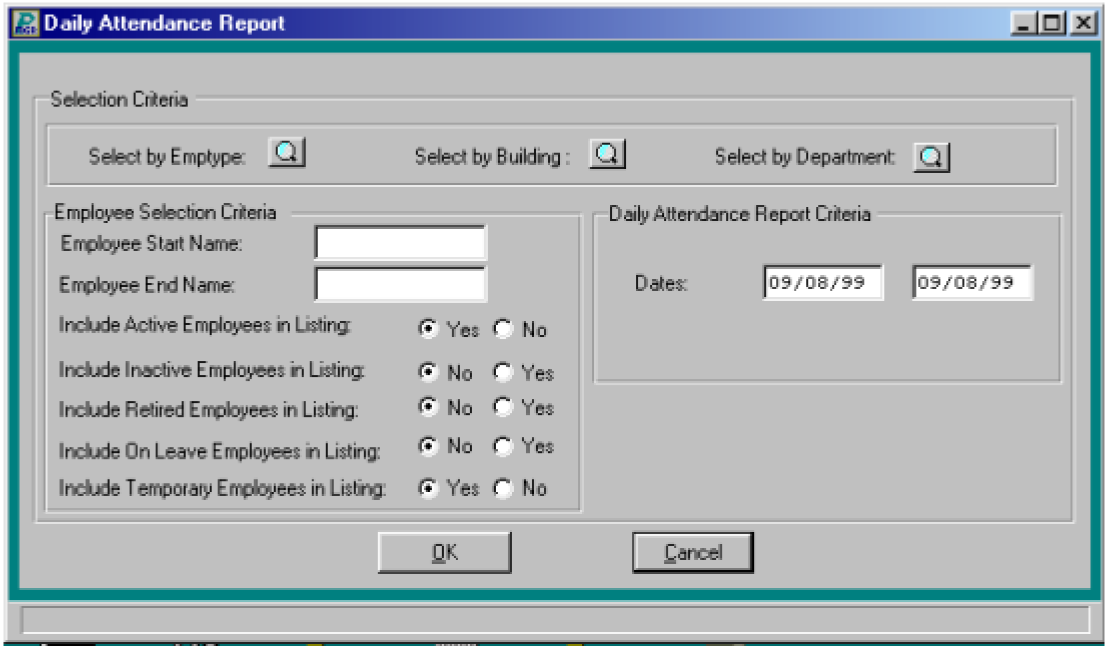
Attendance Worksheet



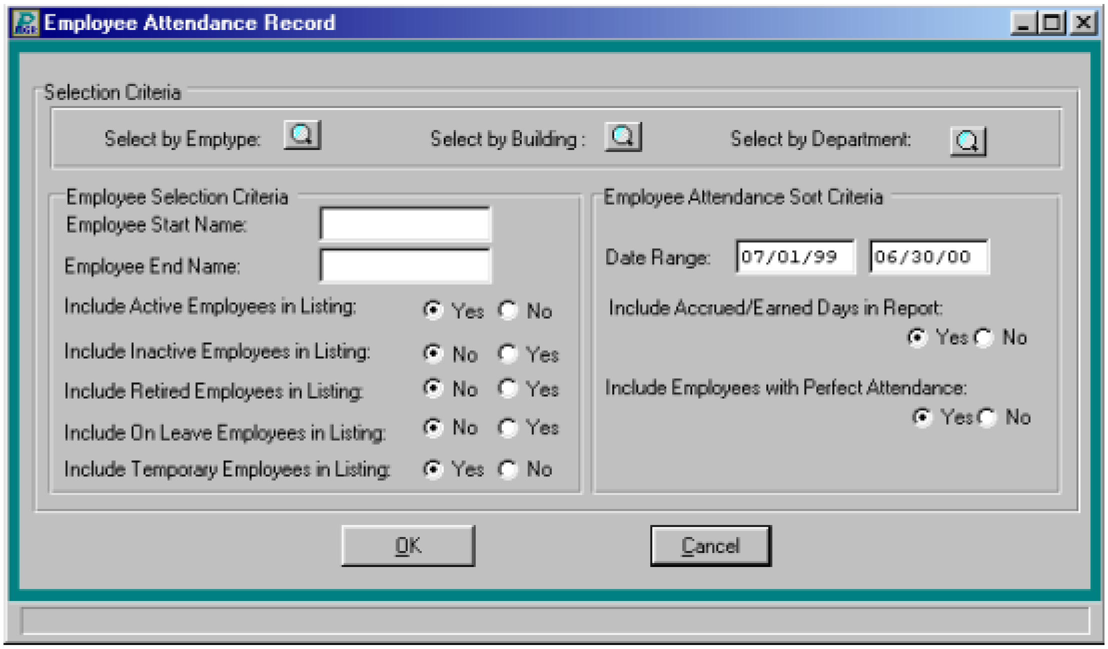
Compensated Absence Listing



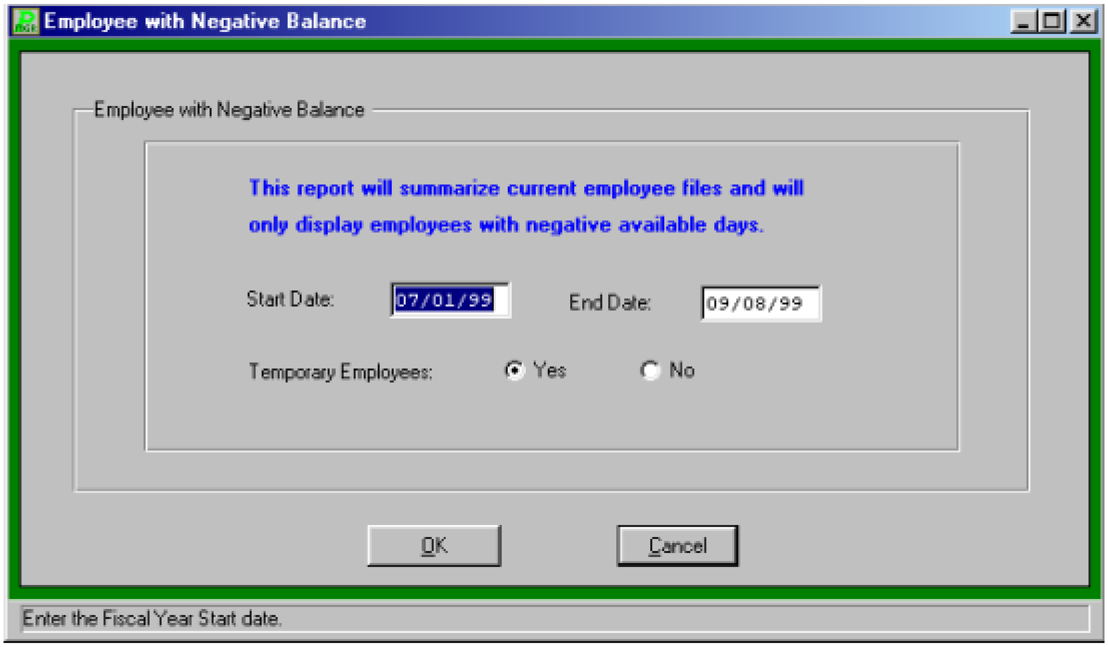
Daily Attendance Report



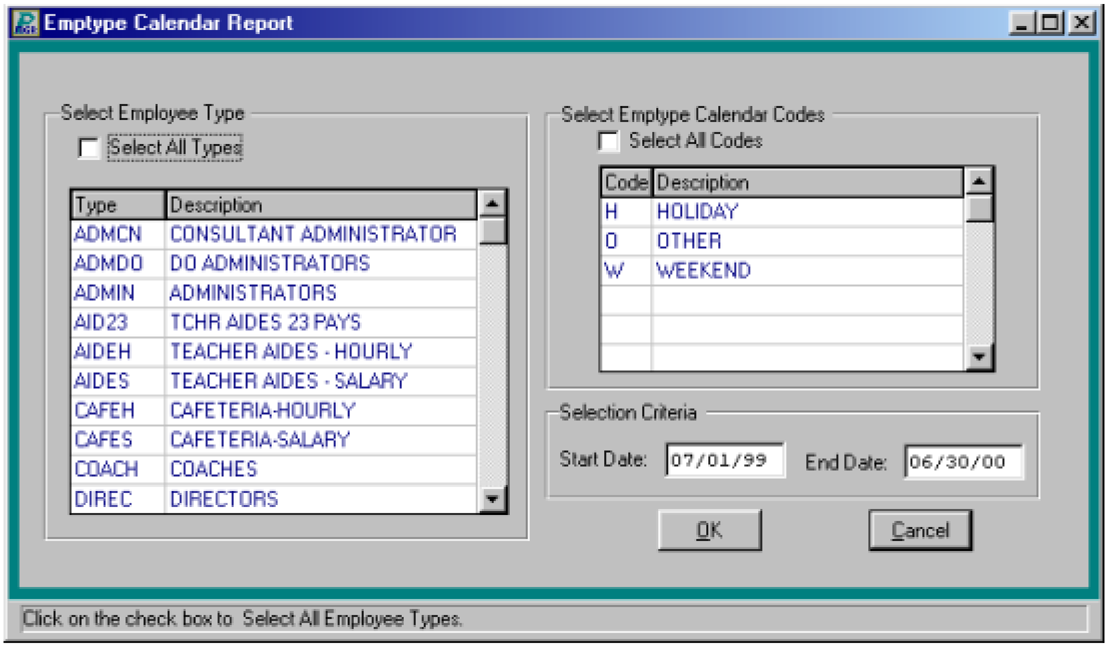
Employee Attendance Report



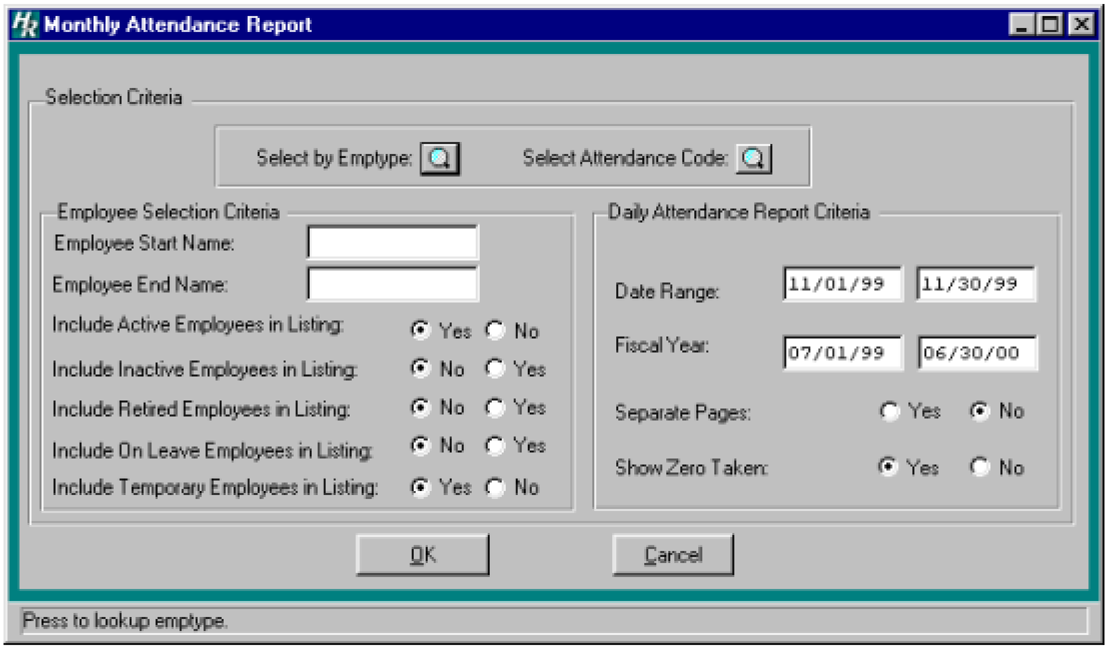
Employees with Negative Balances



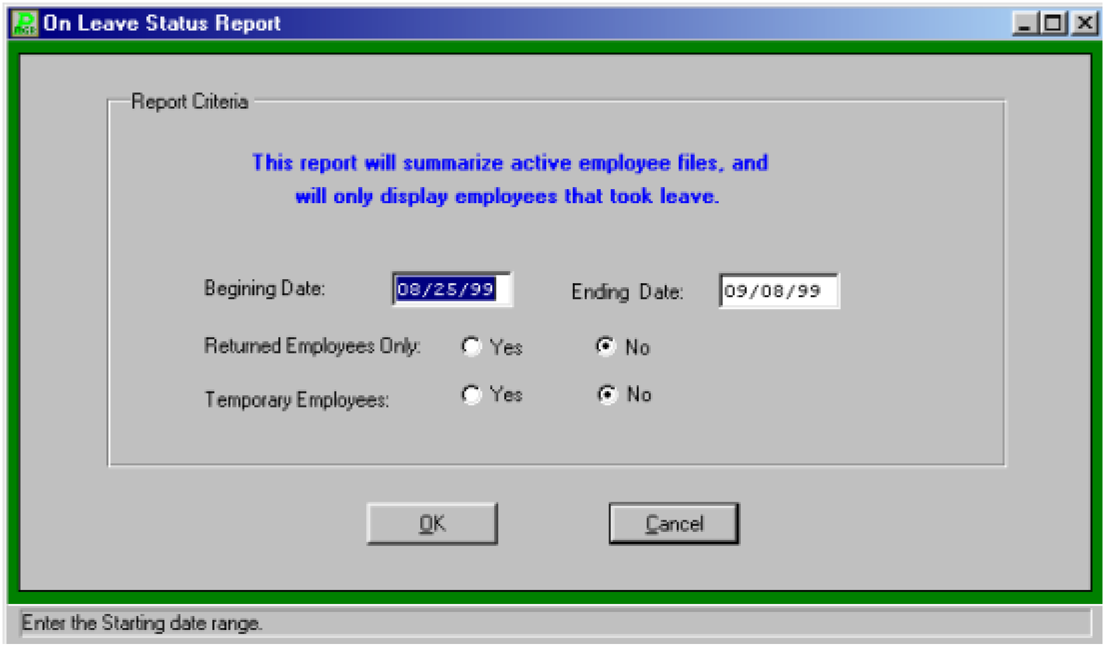
Employee Type Calendar Report



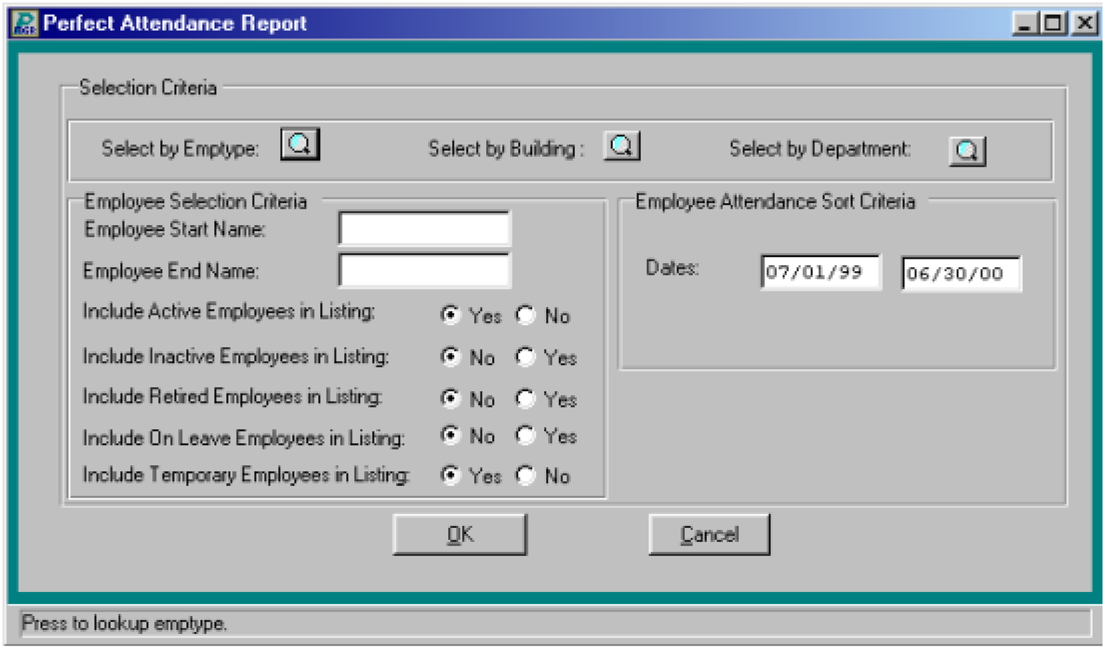
Monthly Attendance Report



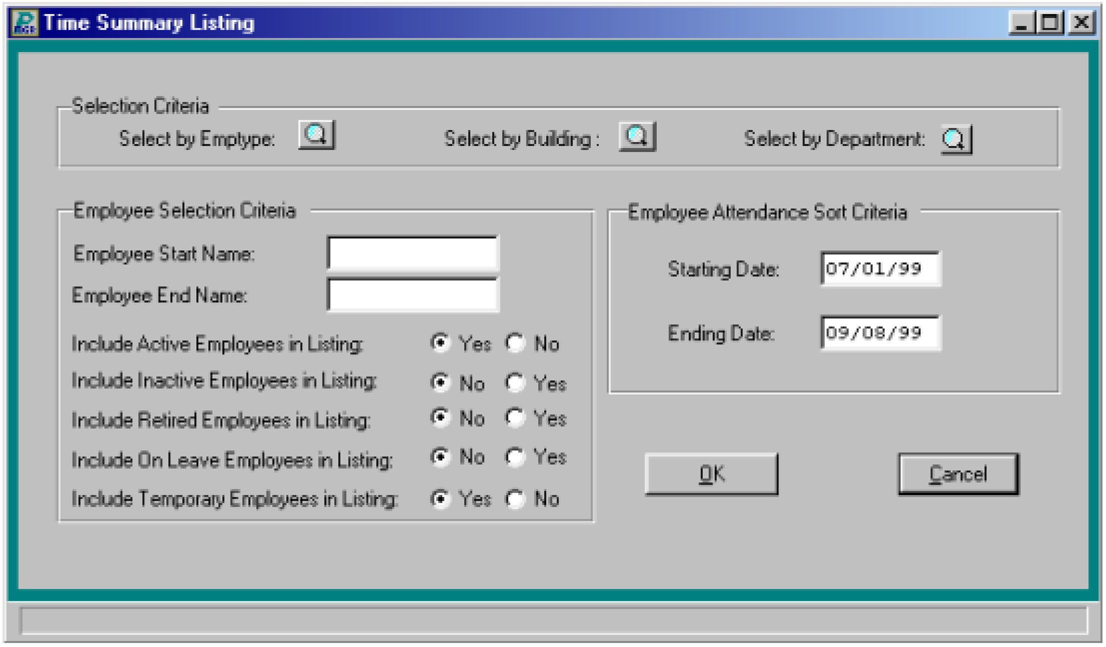
On Leave Status Report



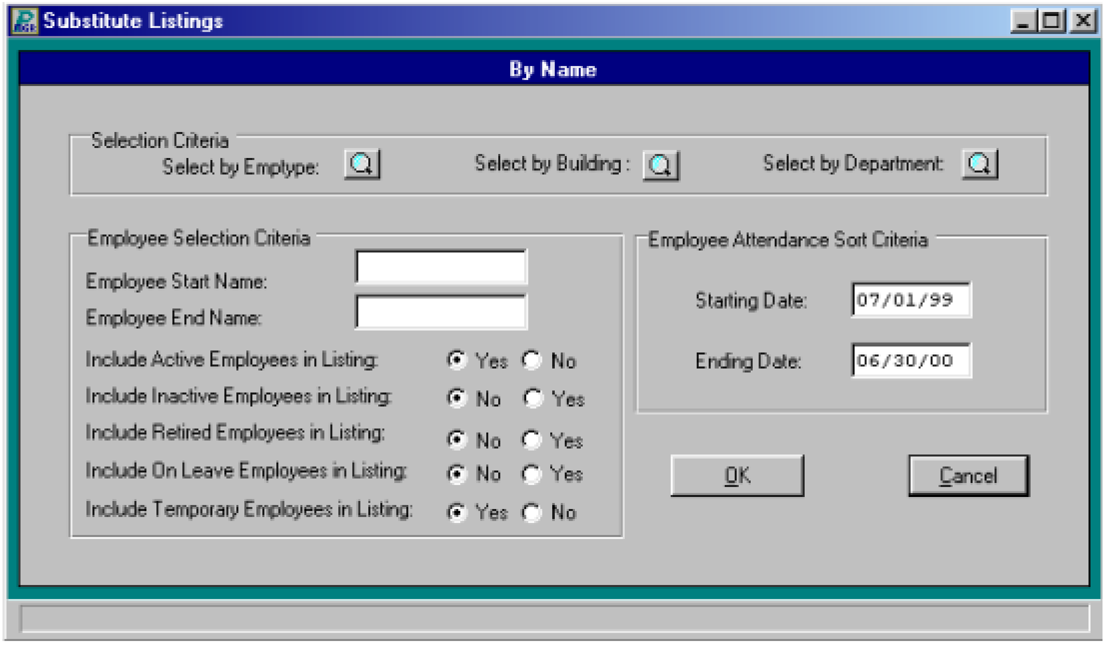
Perfect Attendance Report



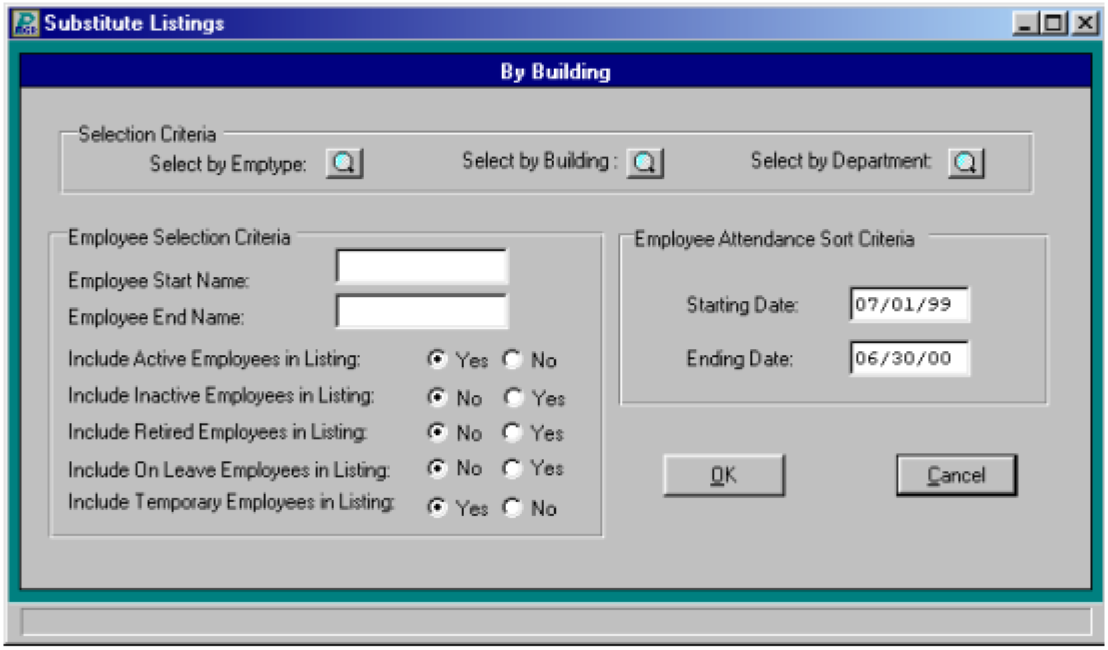
Time Summary Listing



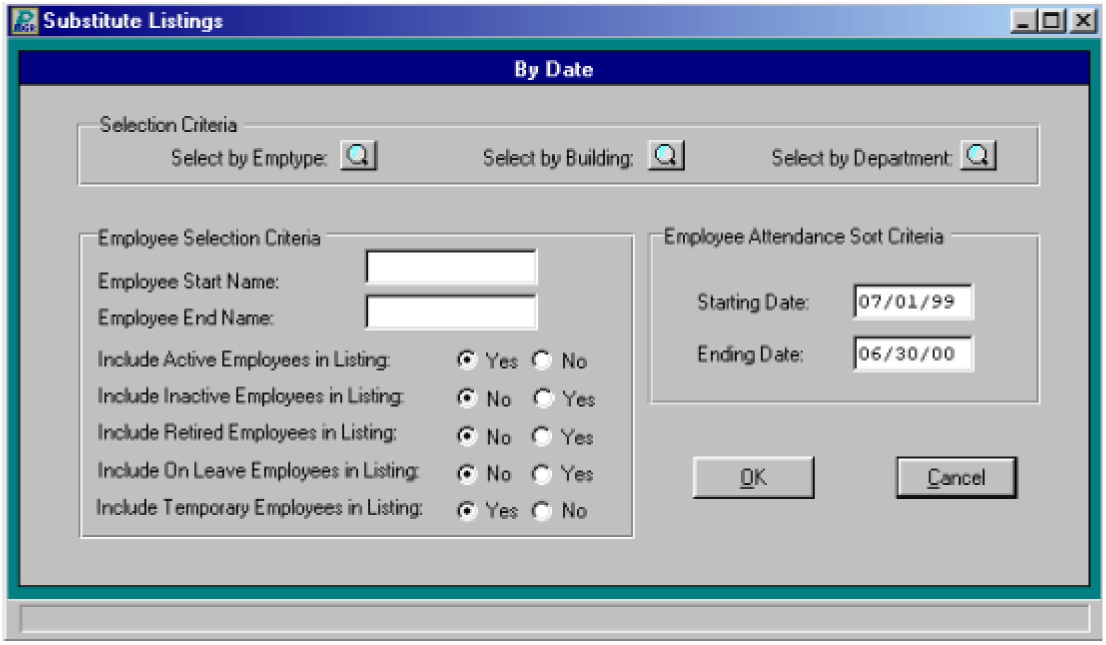
Substitute Listing by Name



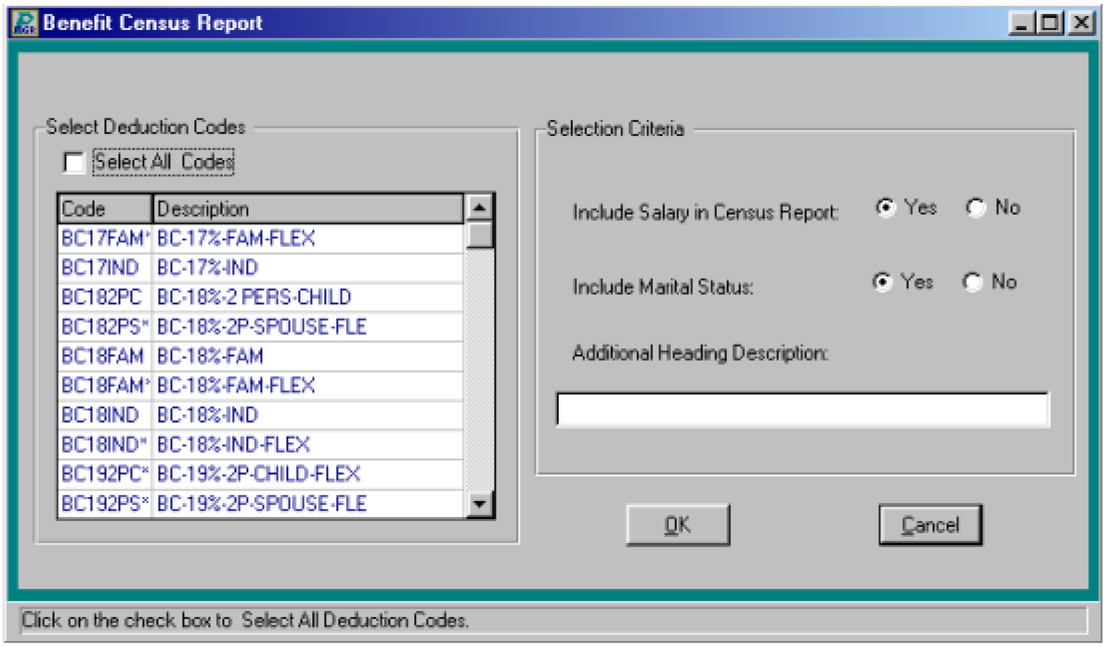
Substitute Listing by Building



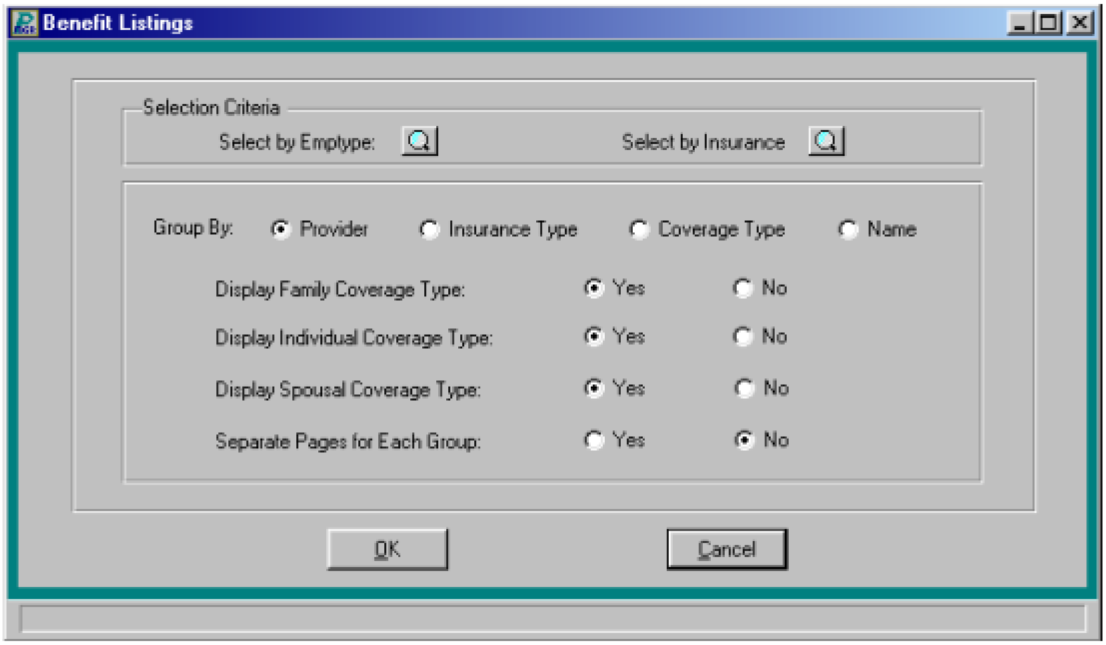
Substitute Listing by Date



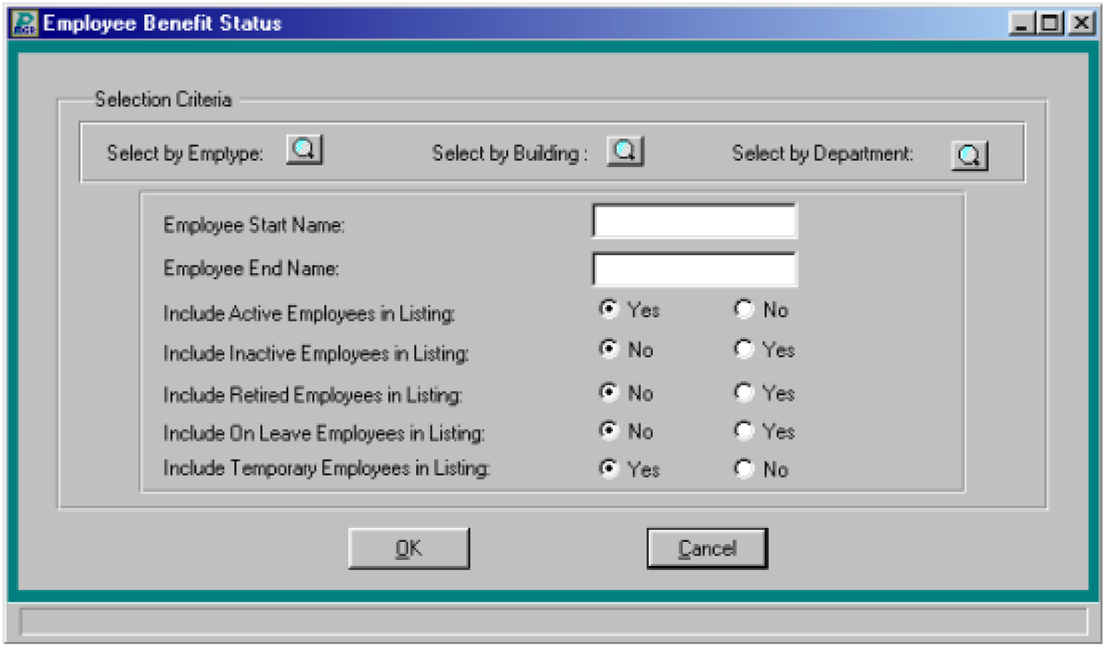
Benefit Census Report



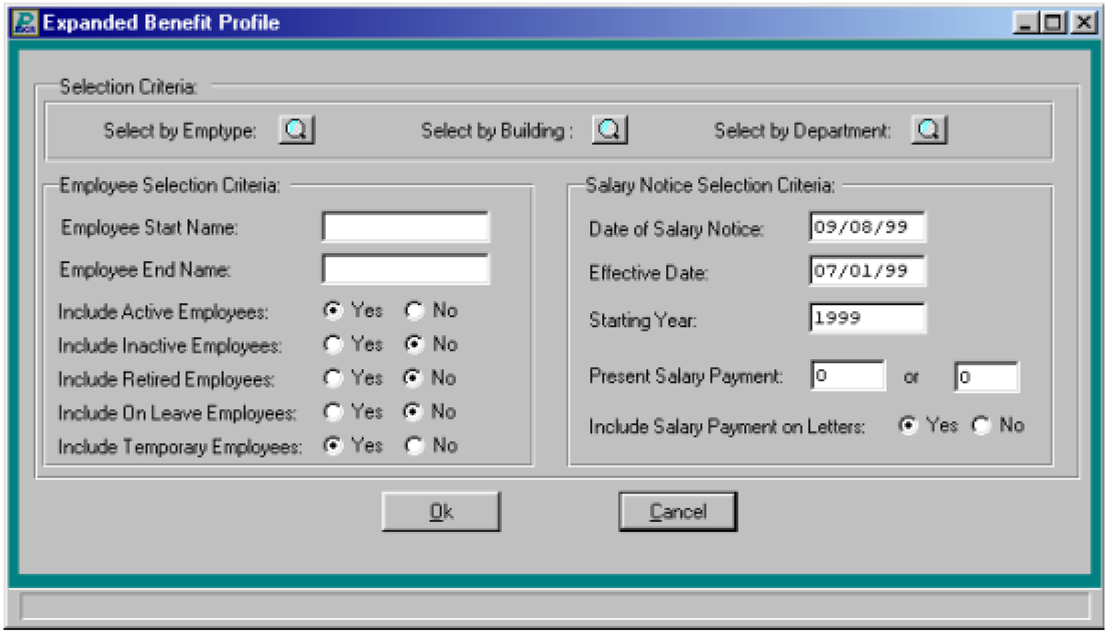
Benefit Listing



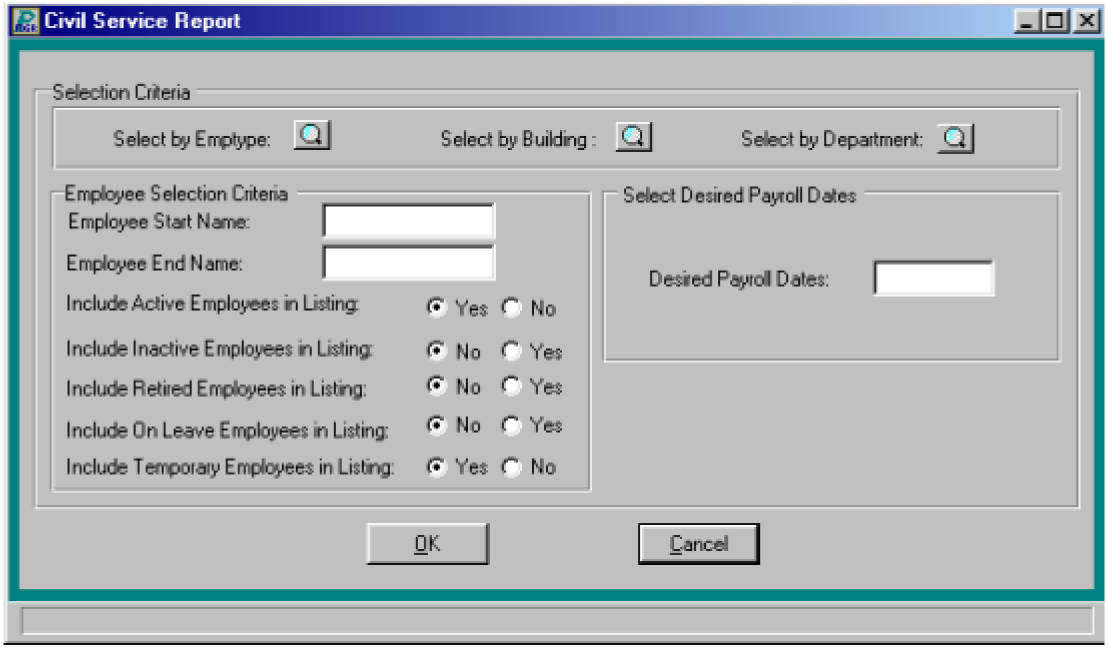
Employee Benefit Status



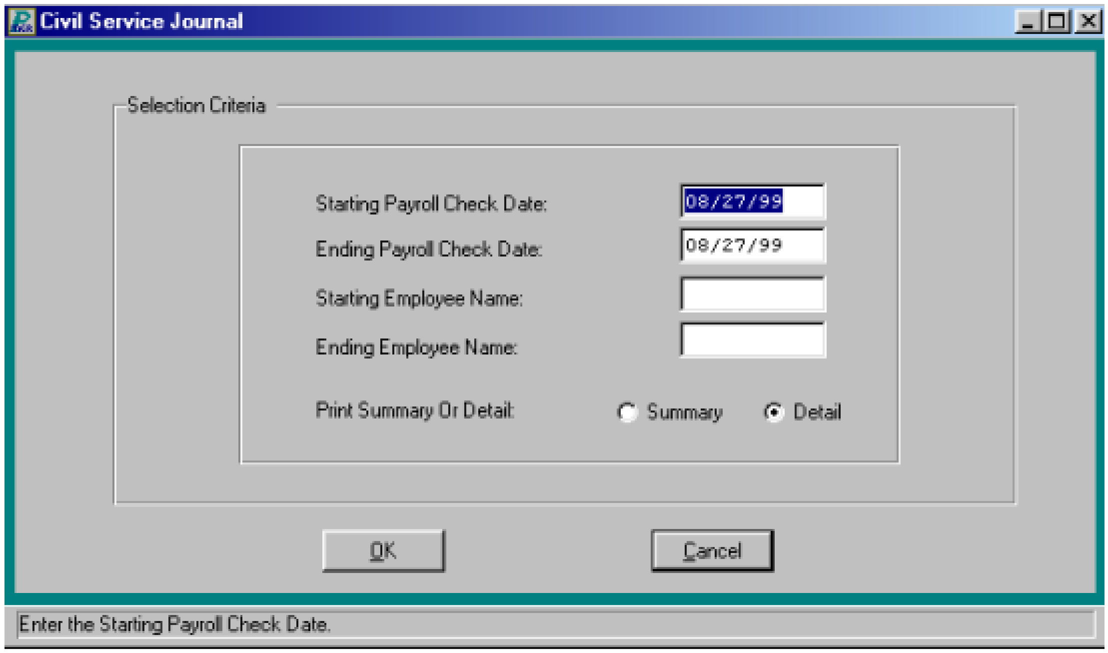
Expanded Benefit Profile



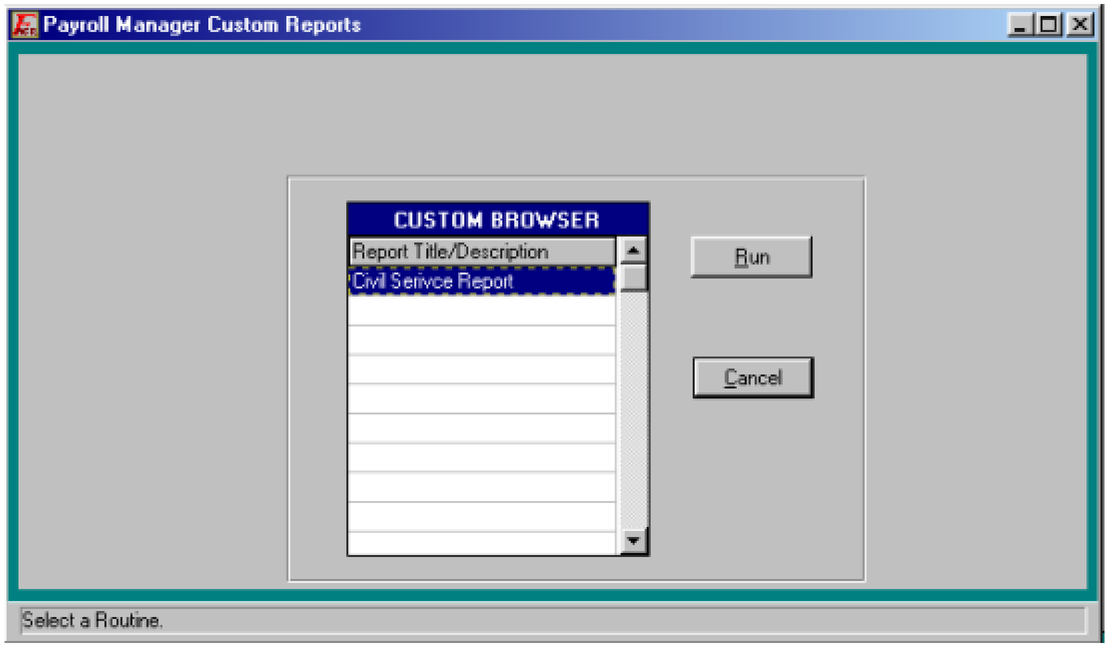
Civil Service Report



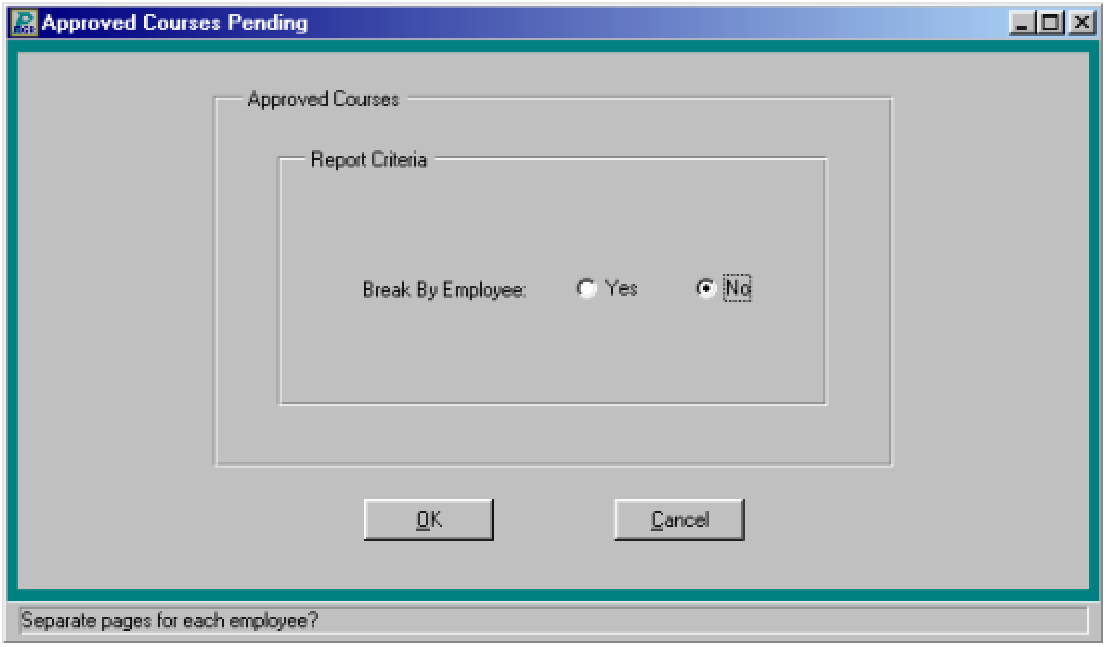
Civil Service Payroll Journal



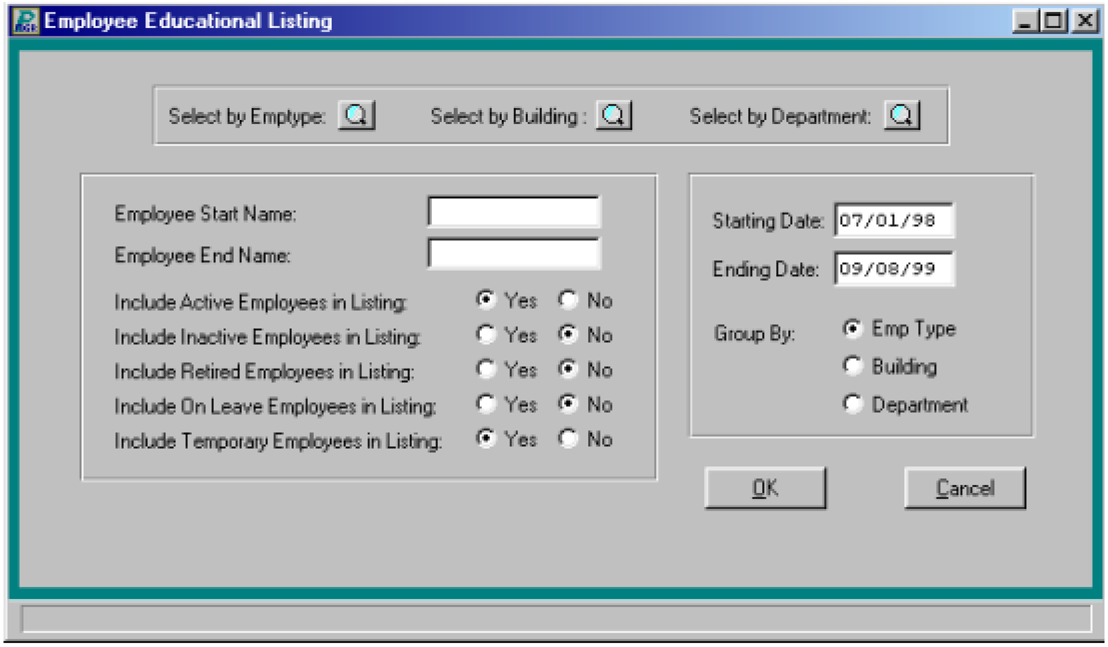
Custom report Menu



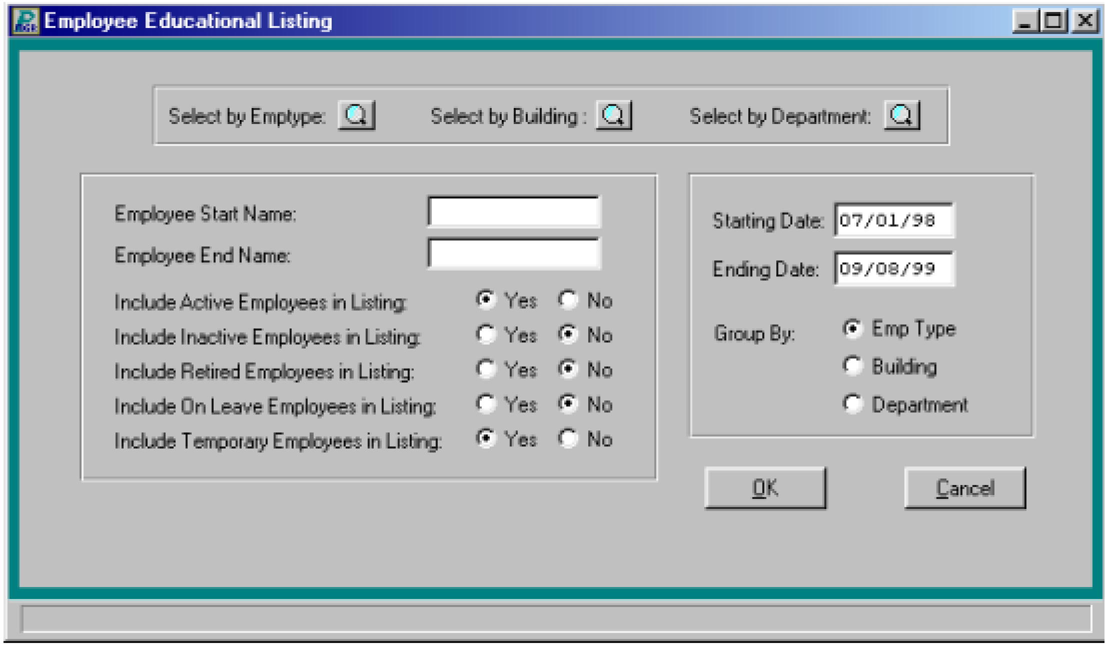
Approved Courses Pending



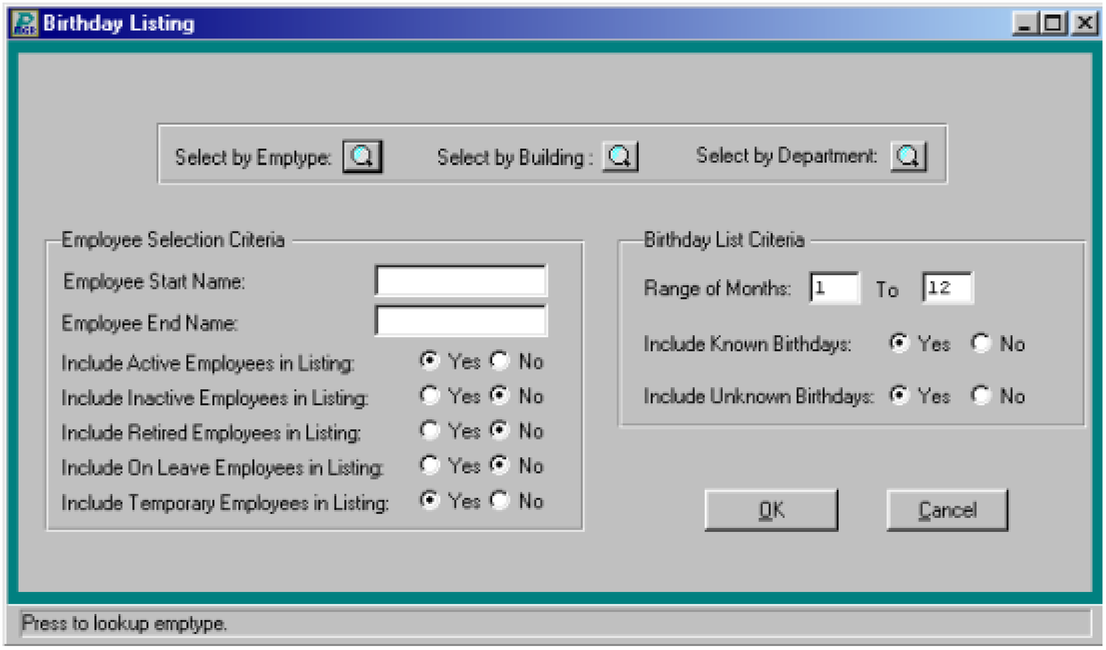
Employee Educational Record



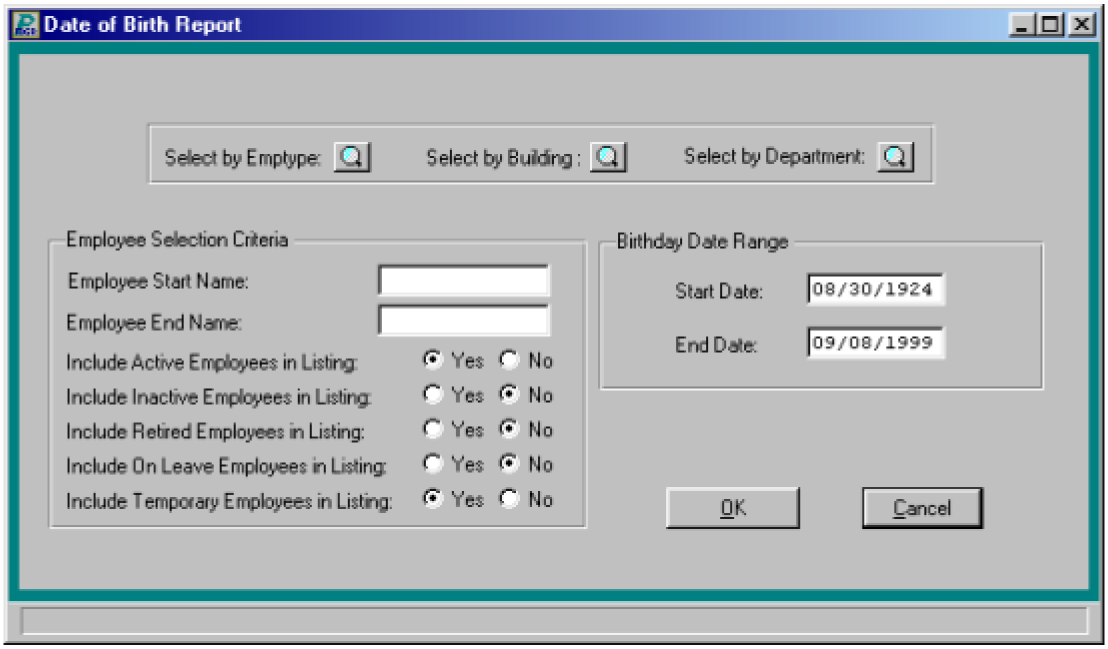
Employee Educational Listing



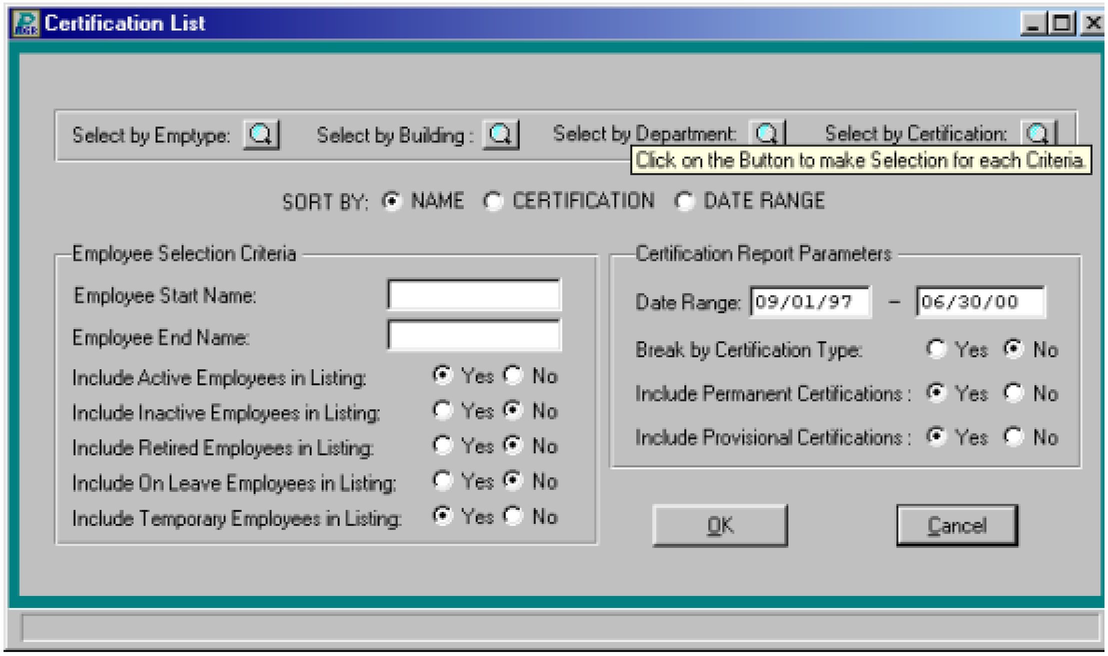
Birthday Listing



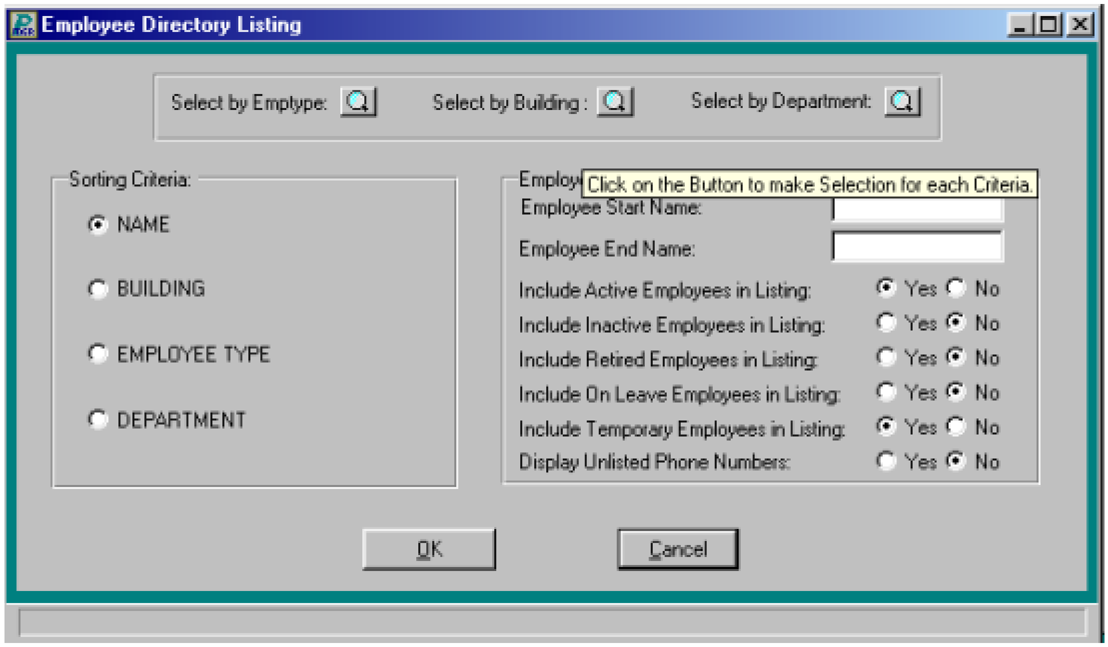
Date of Birth Reports



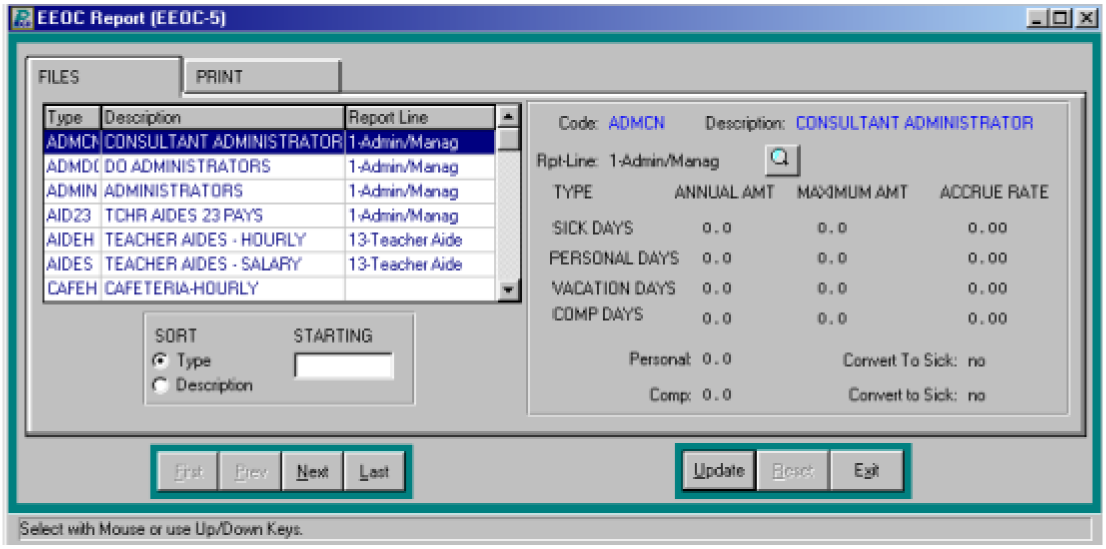
Certification Listing



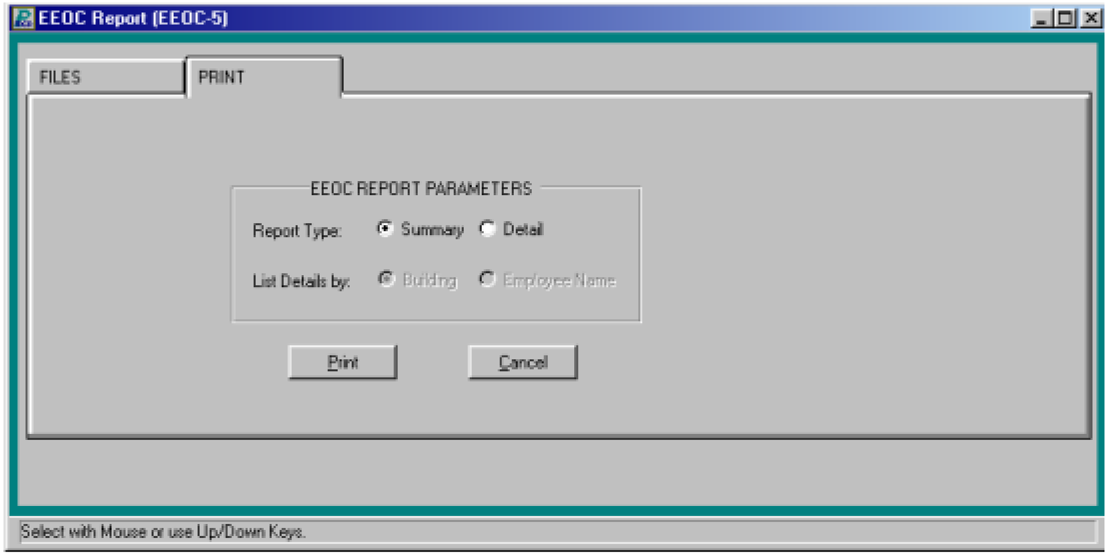
Employee Directory



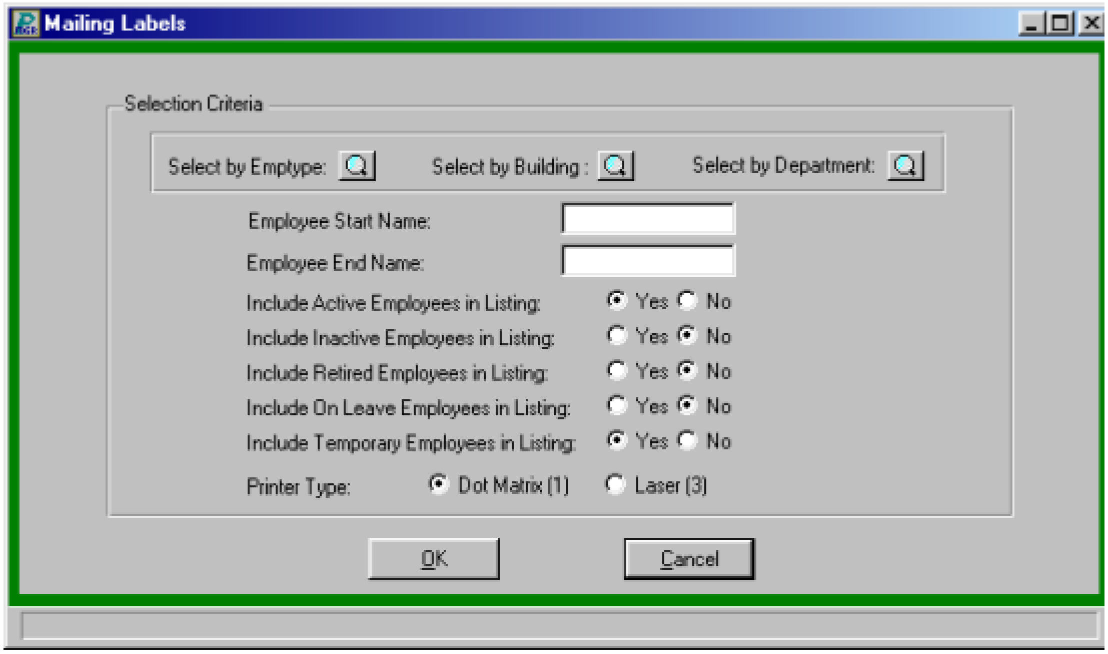
EEOC Report Files Folder



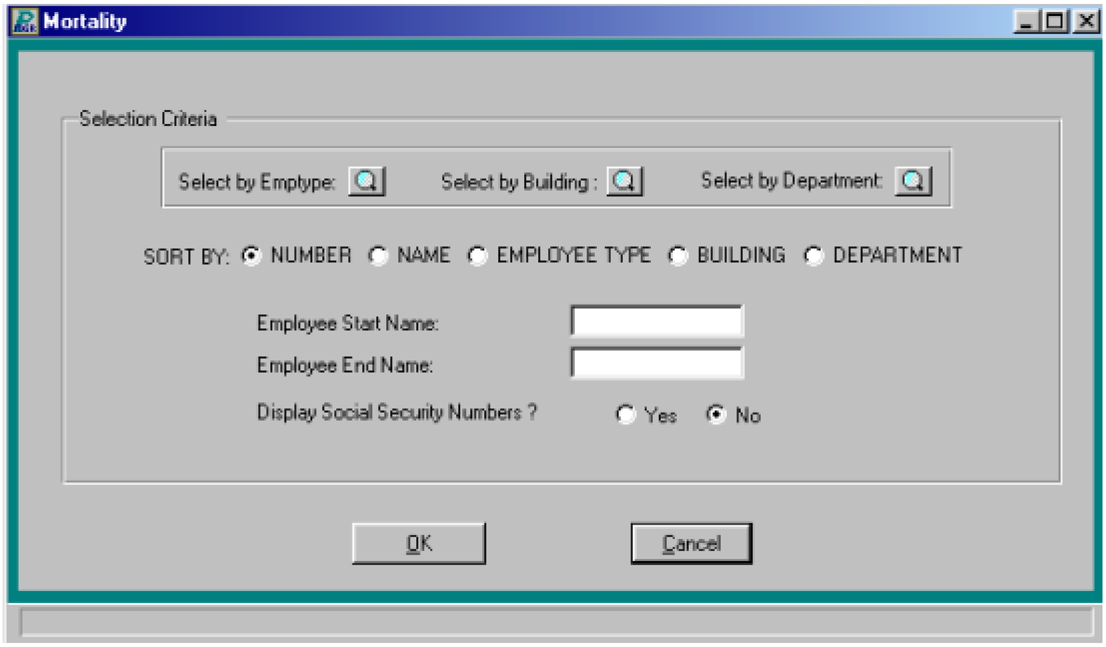
EEOC Report Print Folder



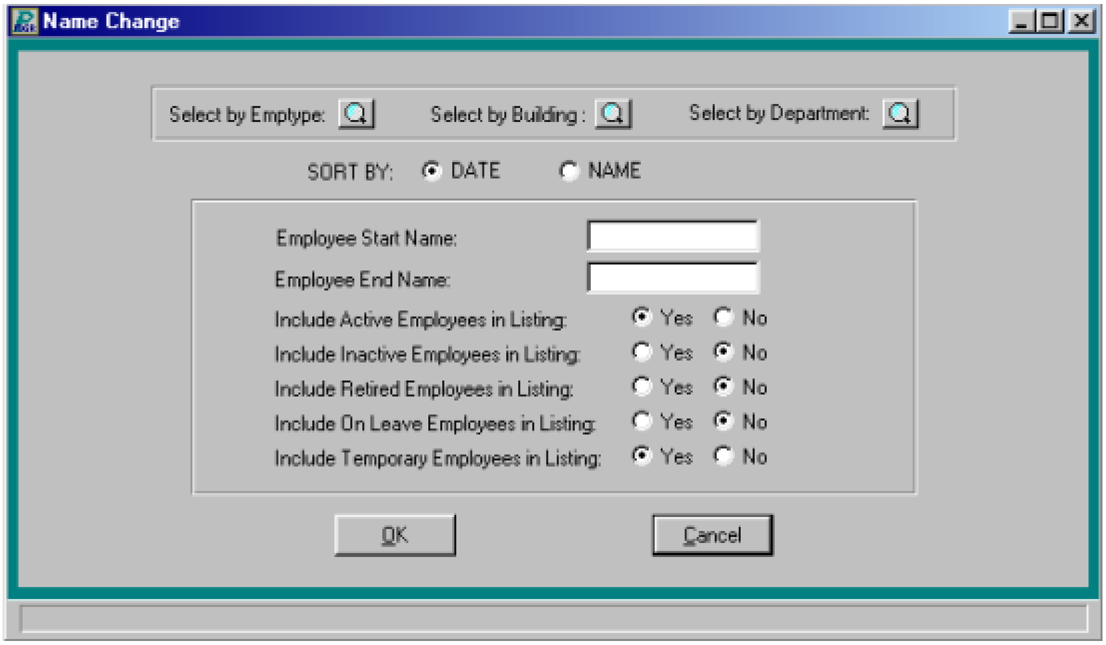
Mailing Labels



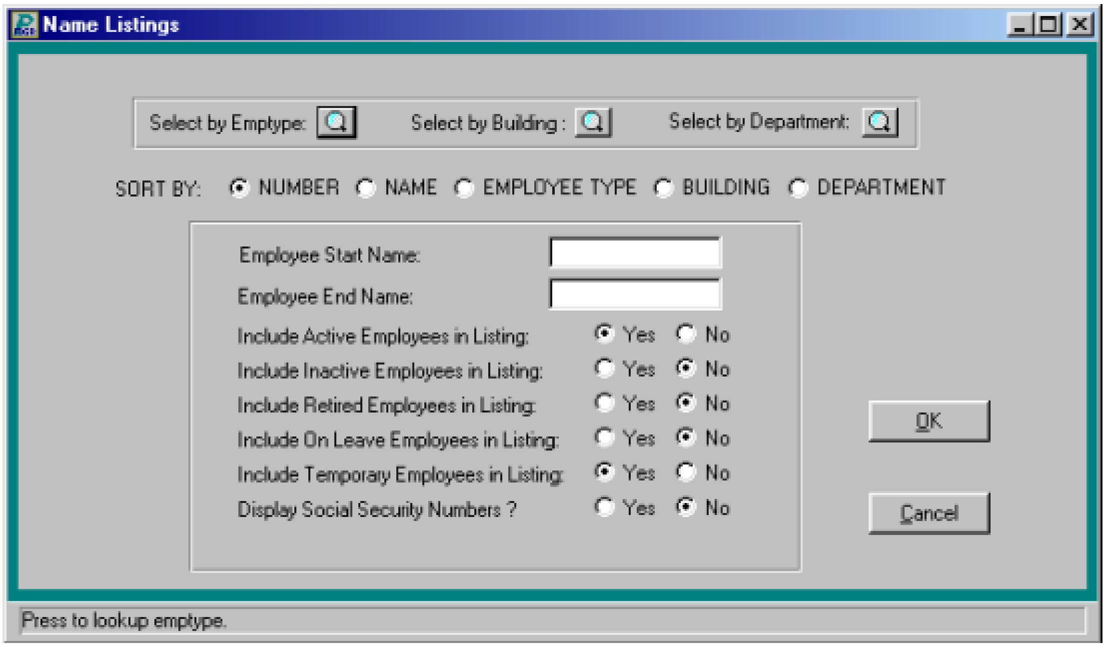
Mortality Report



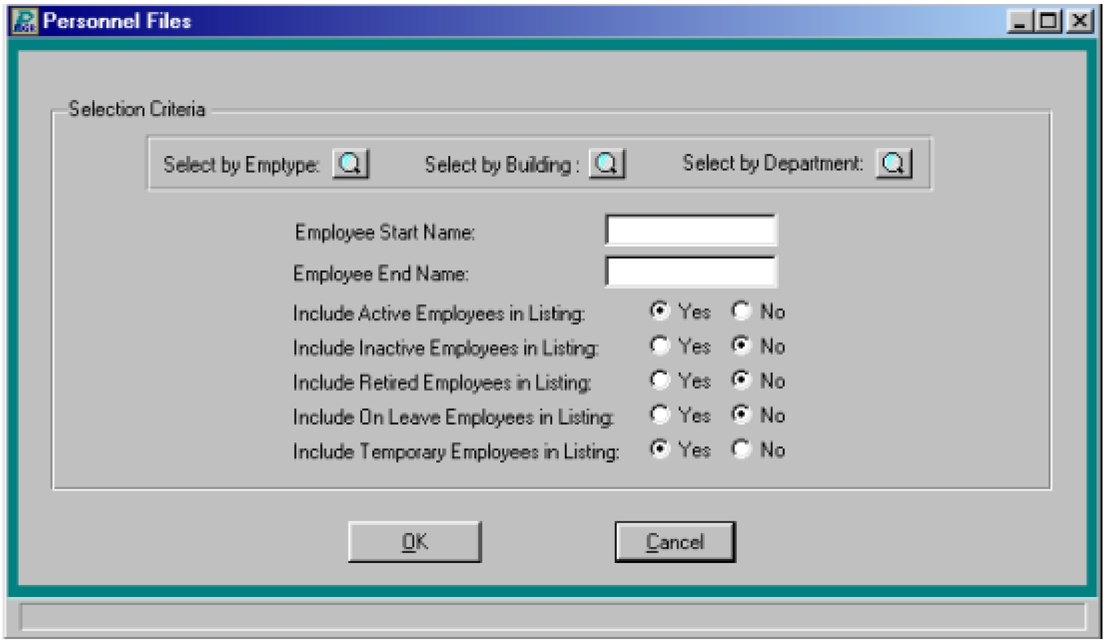
Name Change


Name Change
Select by Emptype:
Select by Building :
Select by Department:
SORT BY: DATE NAME
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

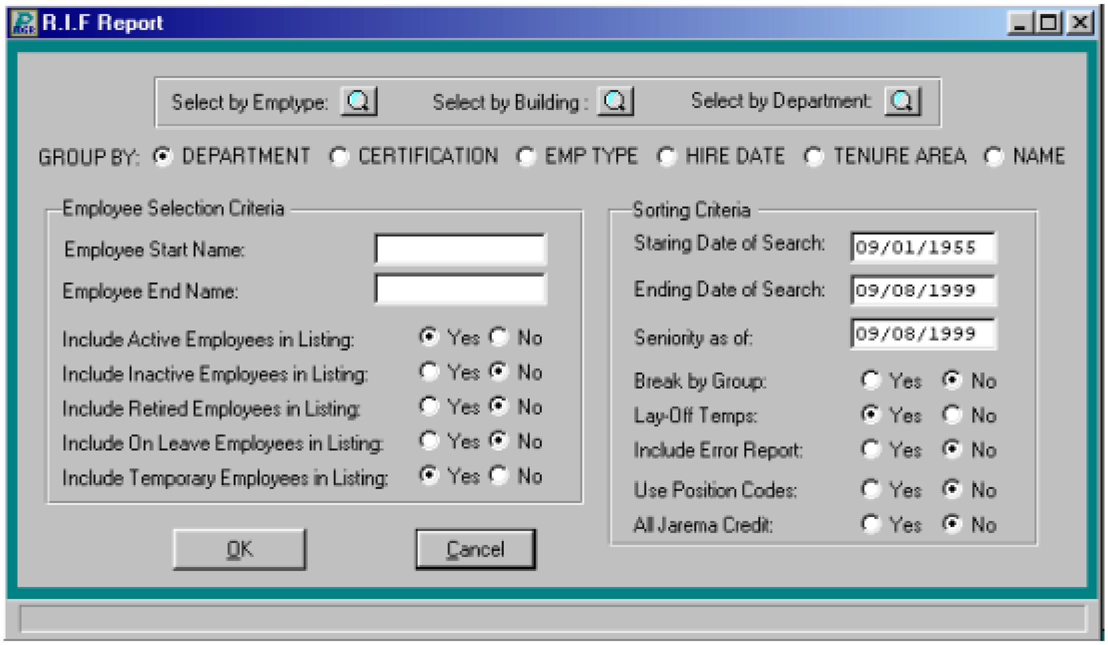
Name Listings



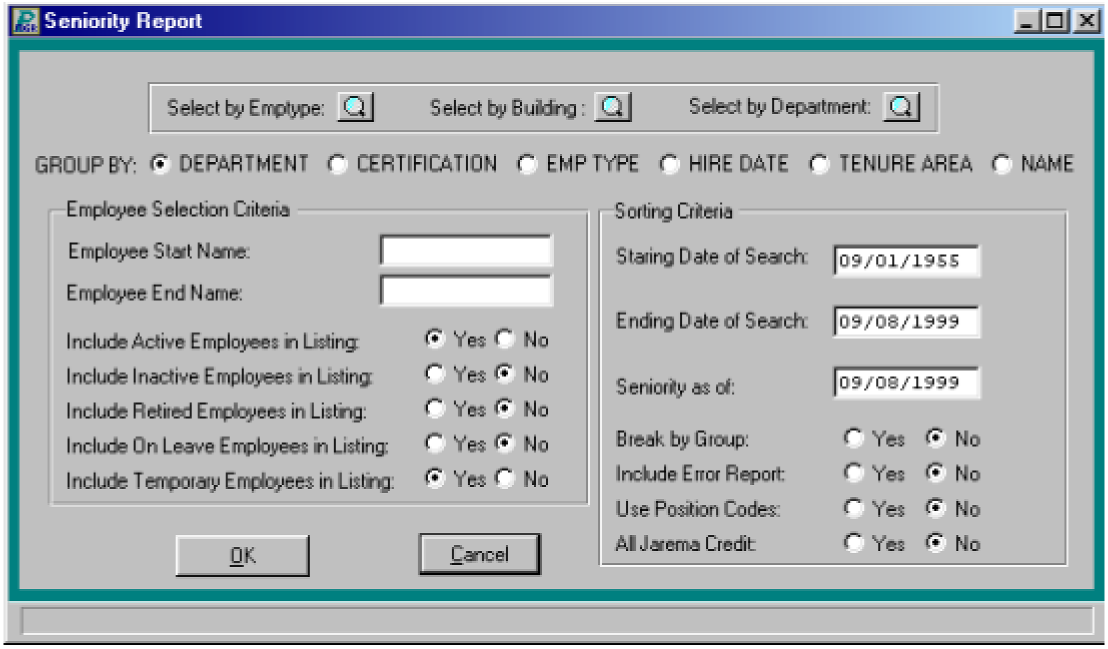
Personnel Files



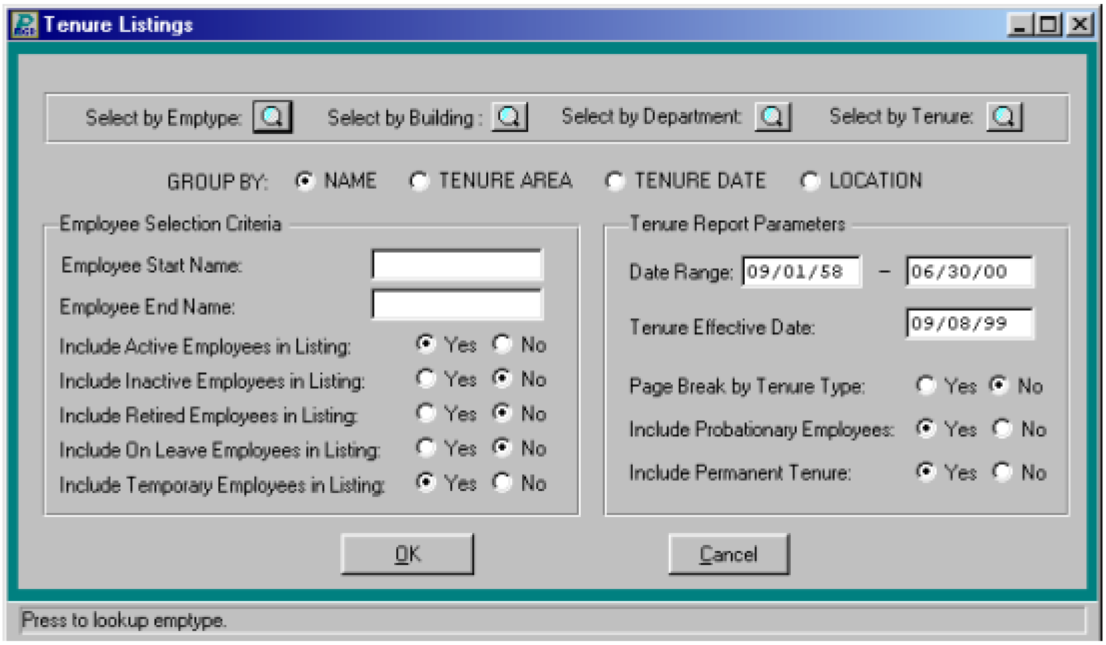
R.I.F. Report


R.I.F Report
Select by Emplype:
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
Staring Date of Search: 09/01/1955
Ending Date of Search: 09/08/1999
Seniority as of: 09/08/1999
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

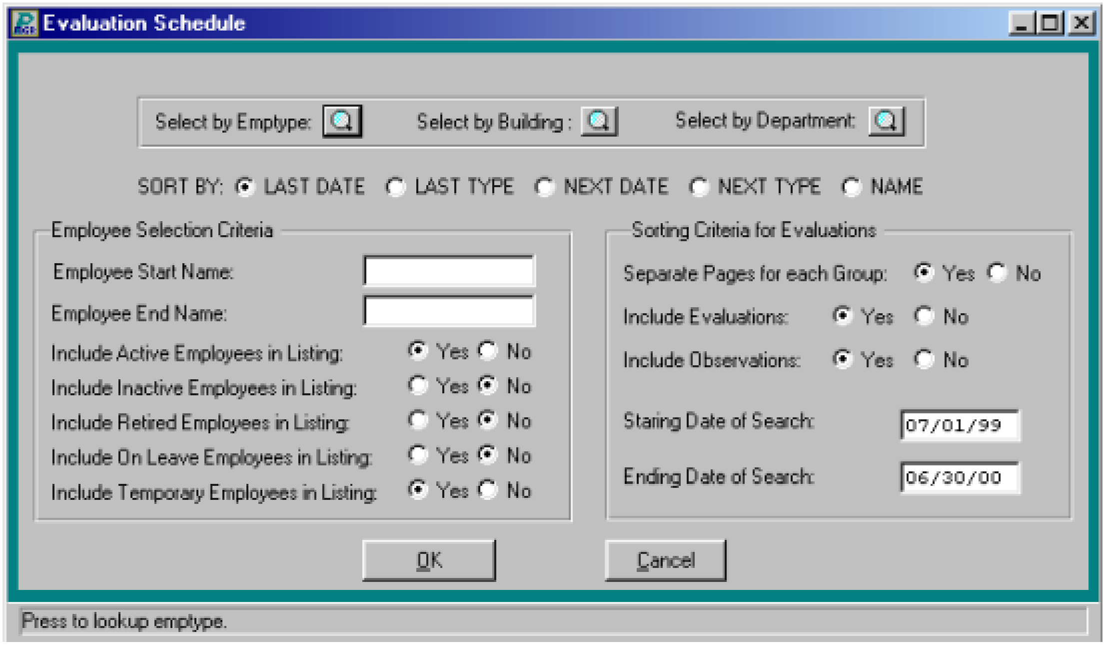
Seniority Reports



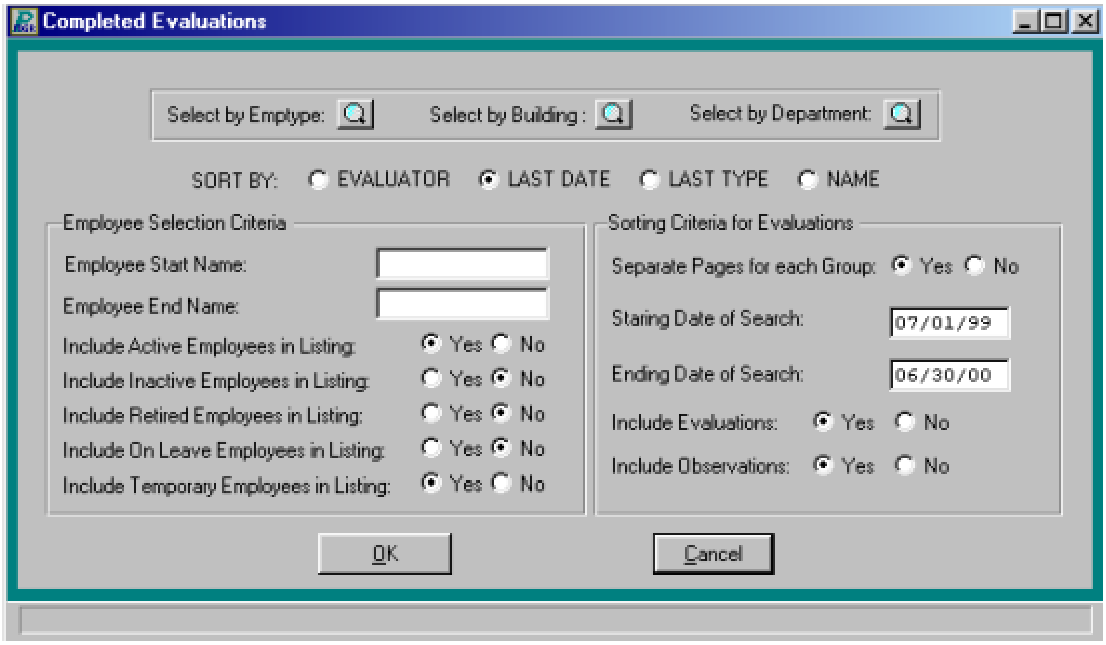
Tenure Listing



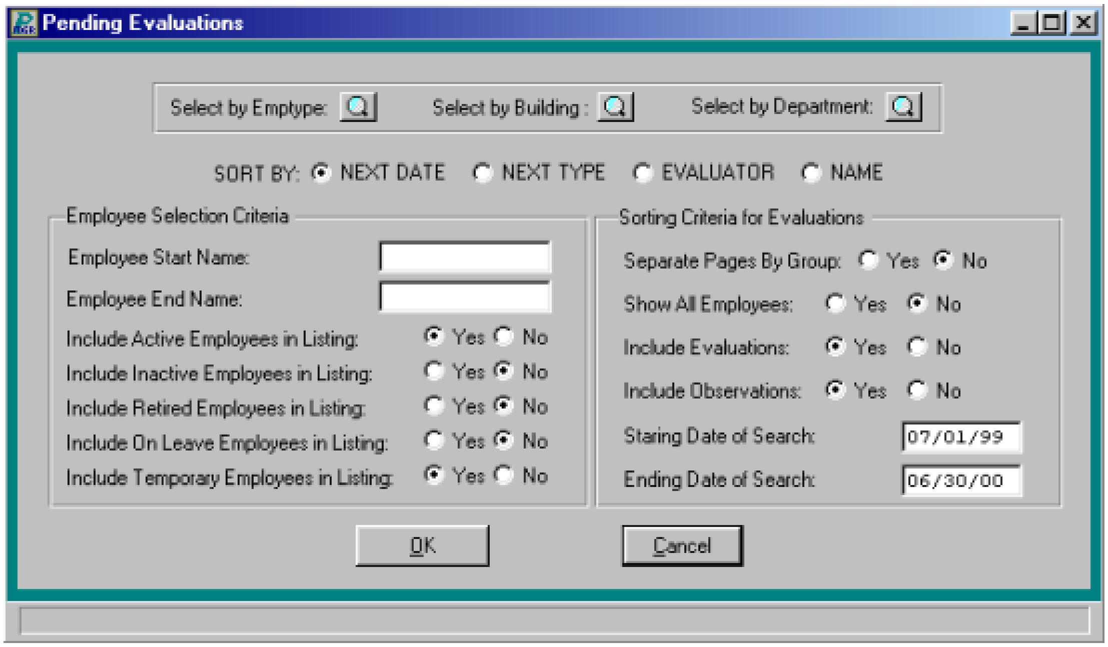
Evaluation Schedule



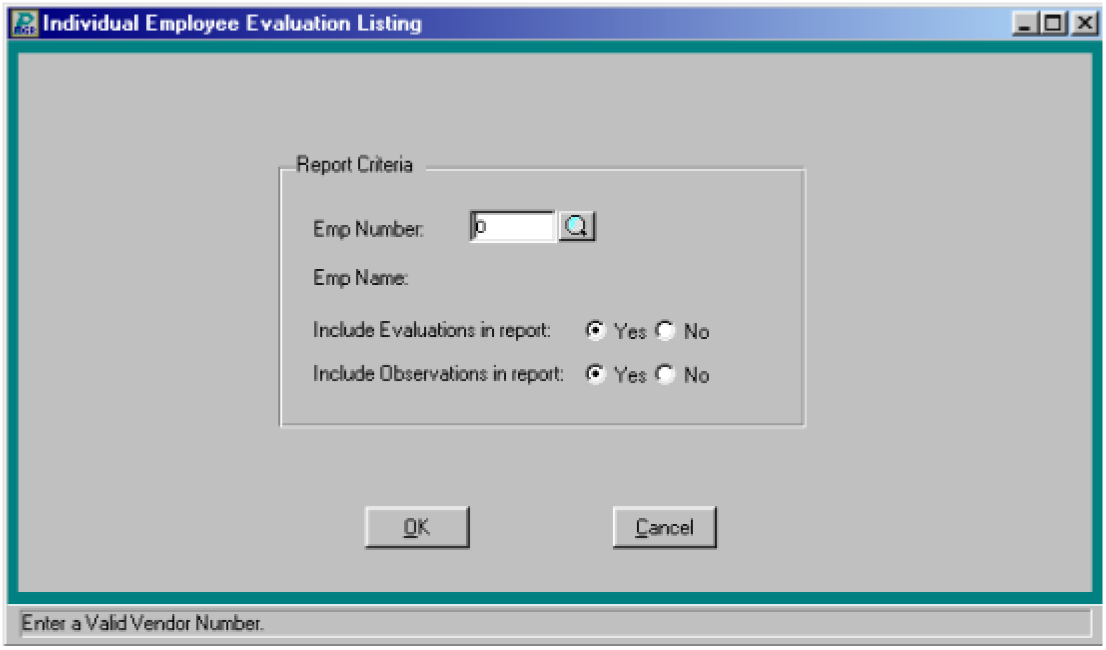
Completes Evaluations



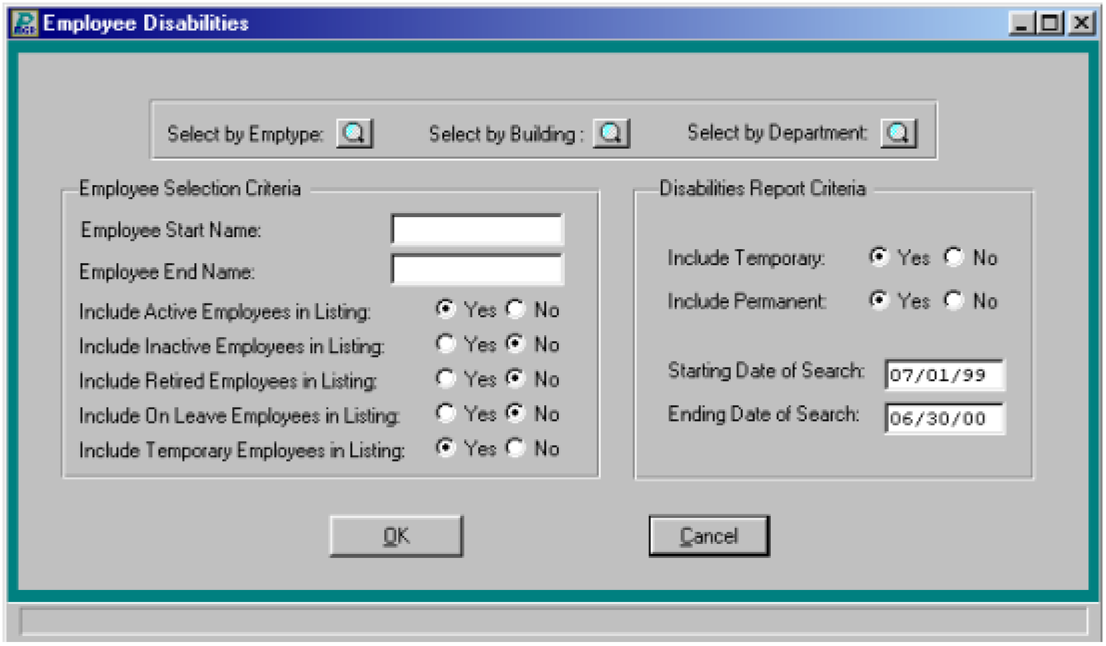
Pending Evaluations



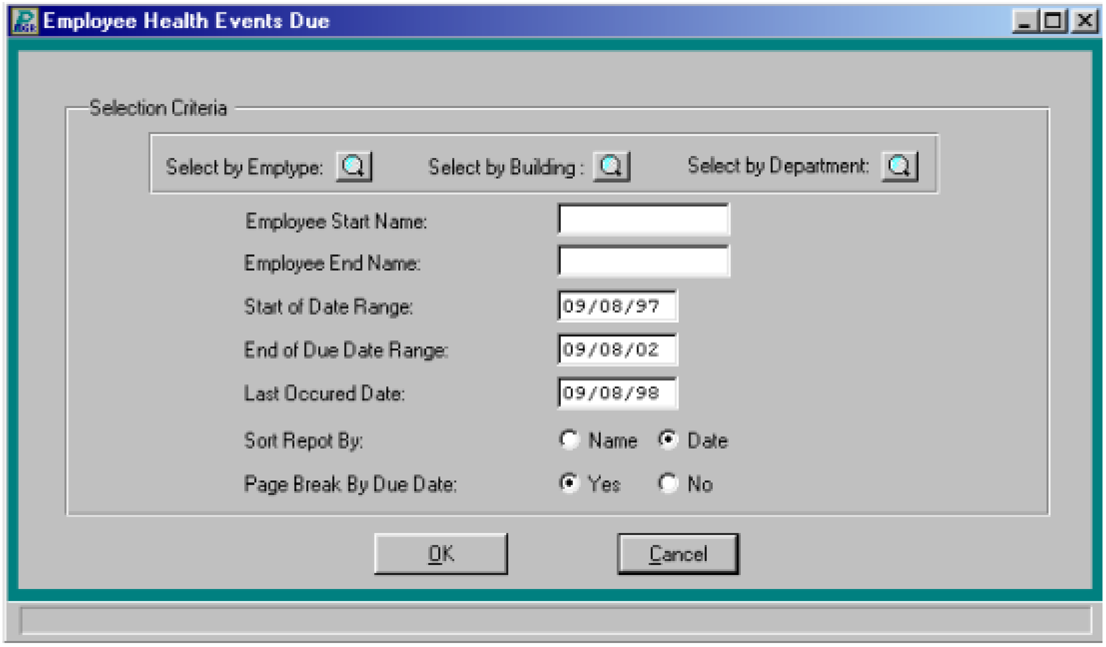
Employee Evaluation Listing



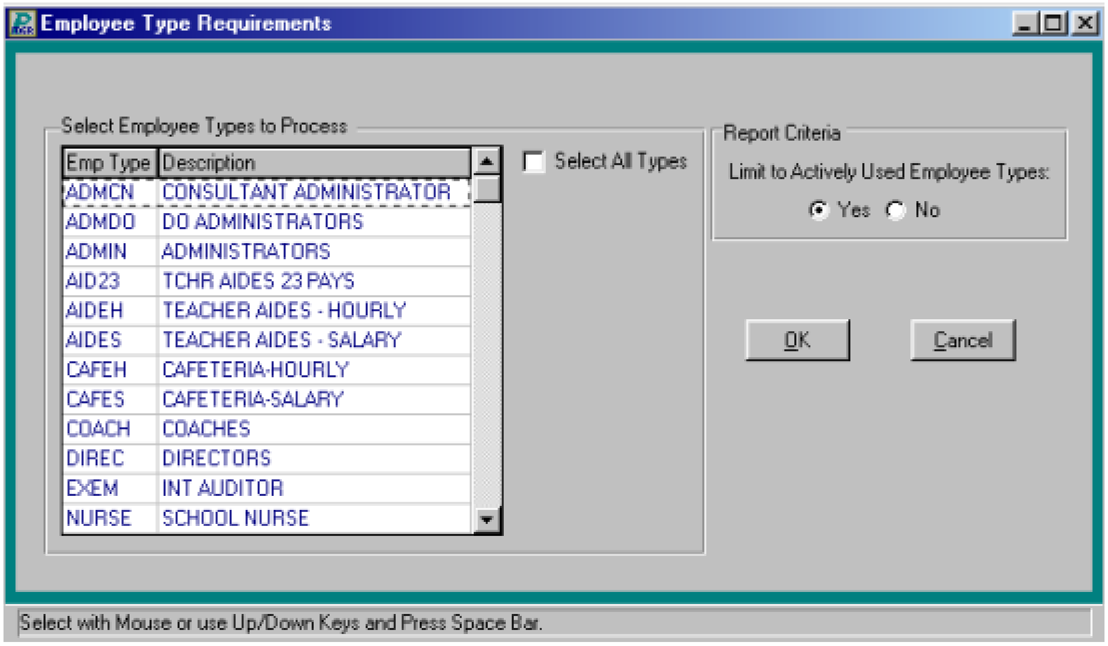
Employee Disabilities



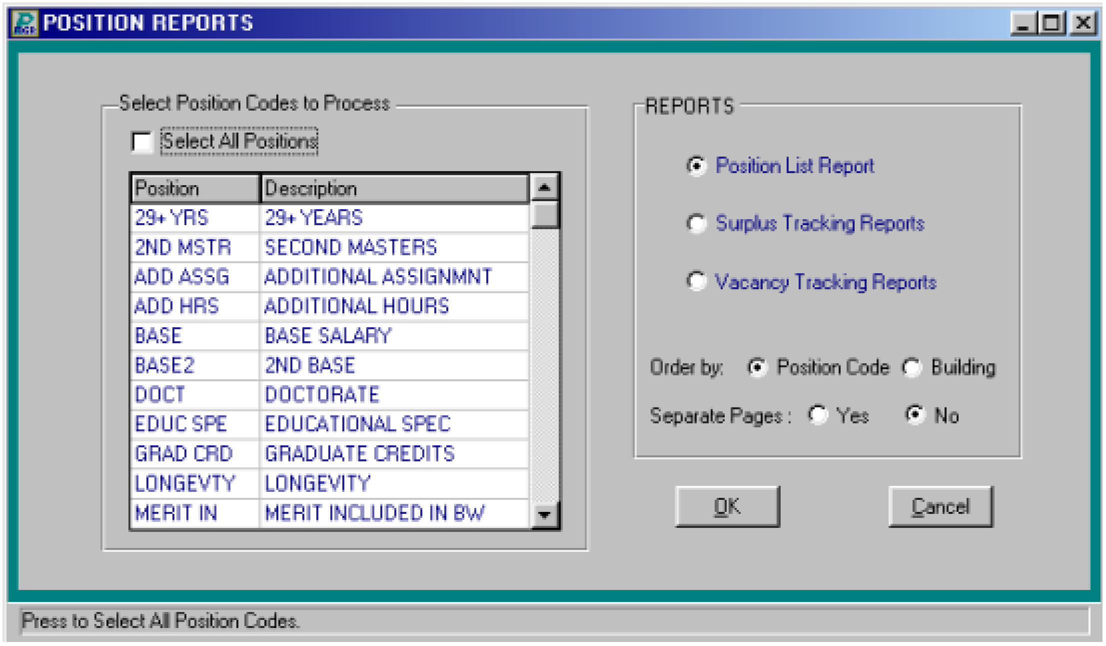
Employee Health Events Due



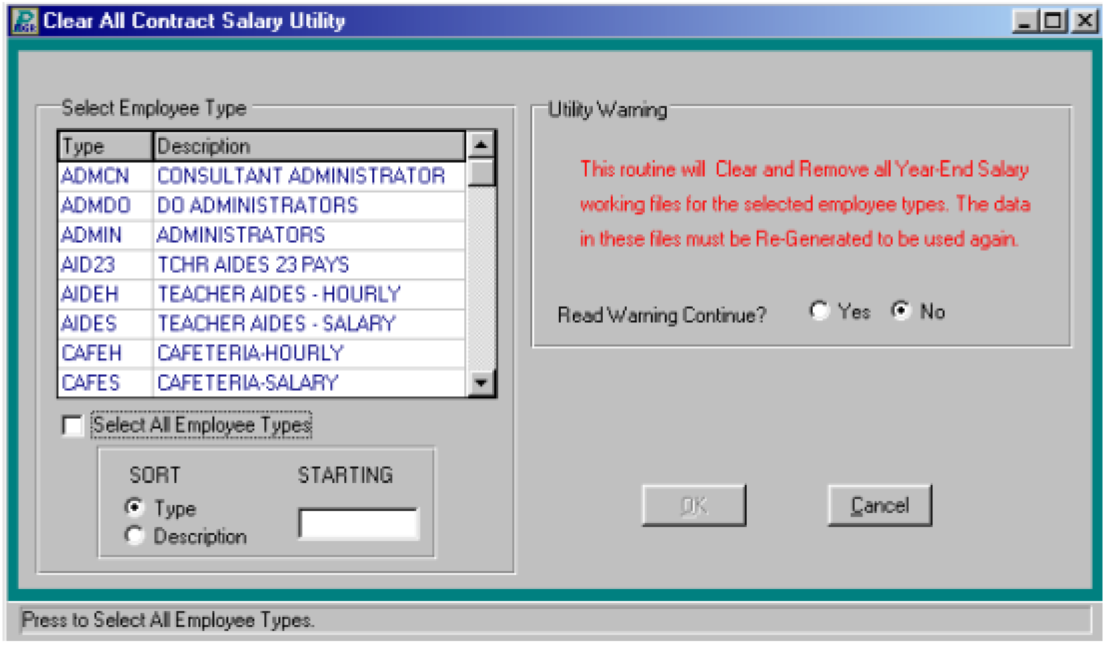
Employee Type Requirements



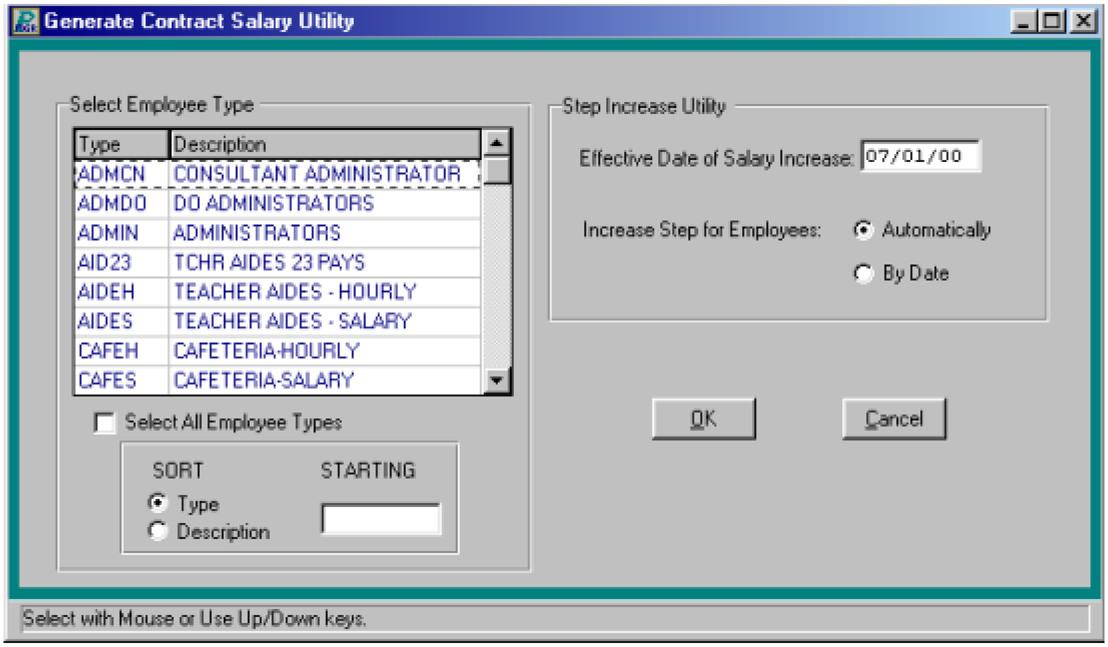
Position Report



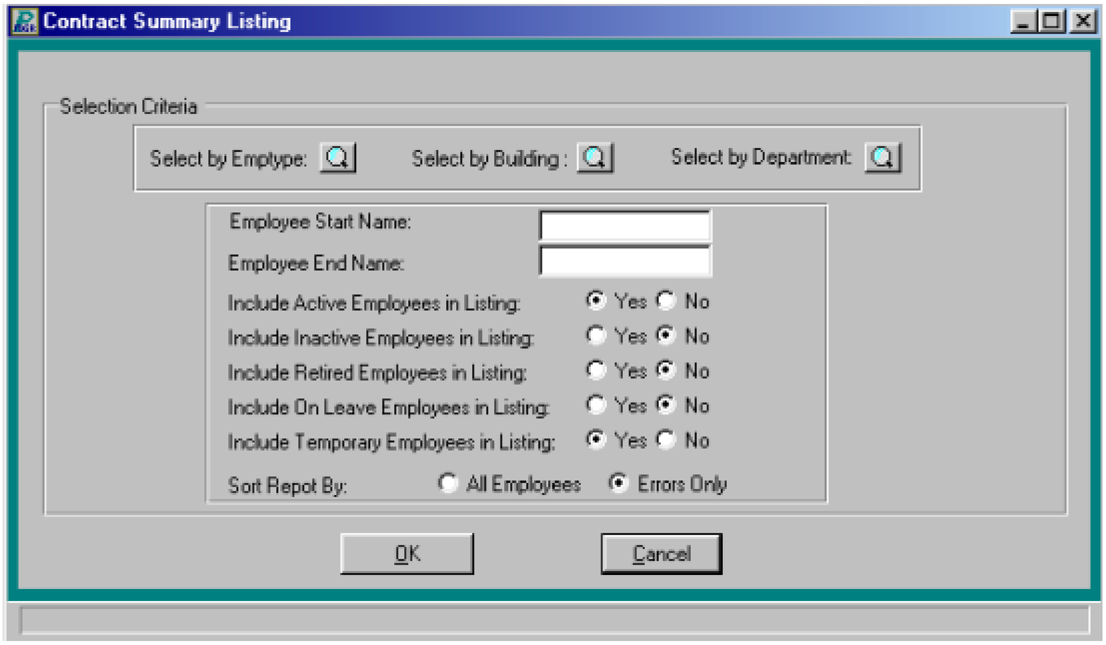
Clear All Contract Salary Information



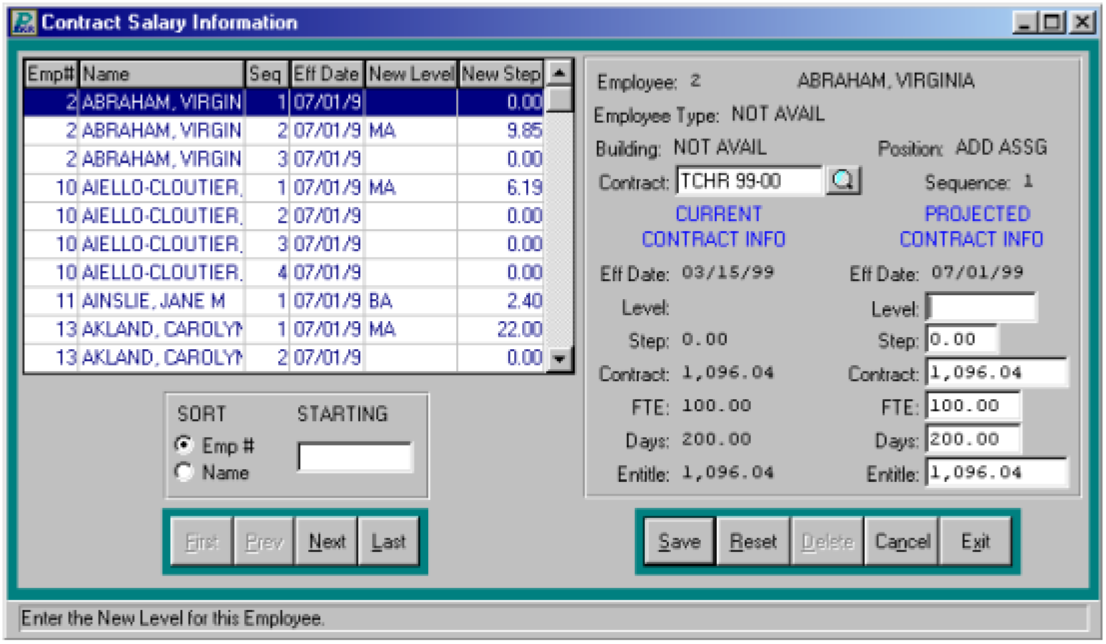
Generate Contract Salary Information



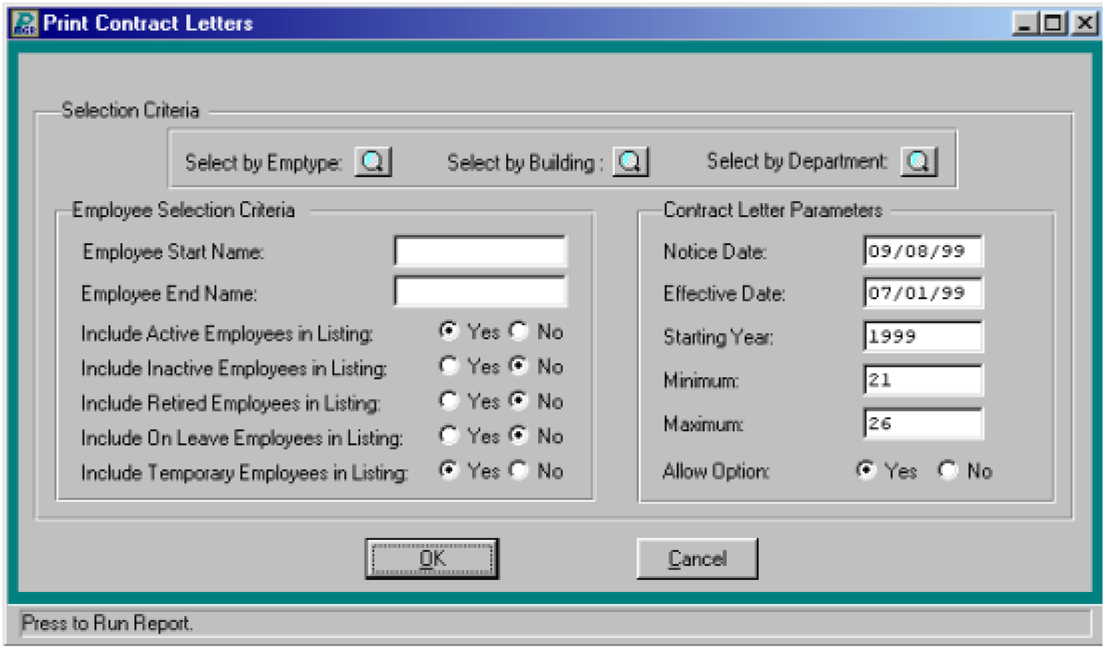
Print Information Summary Listings



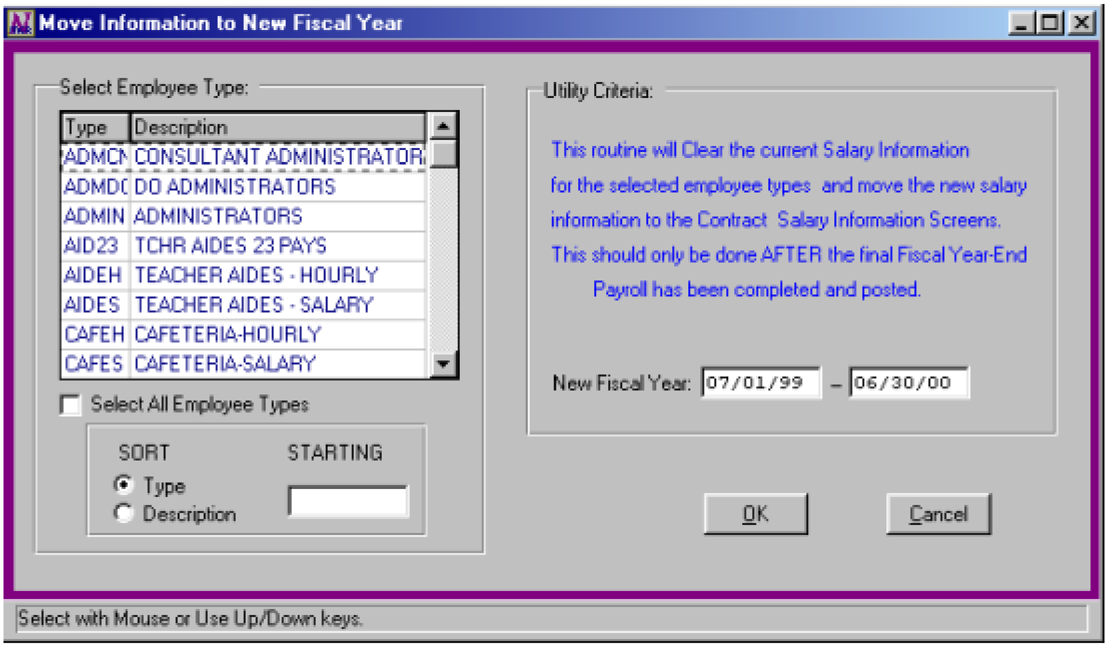
Modify Contract Salary Information



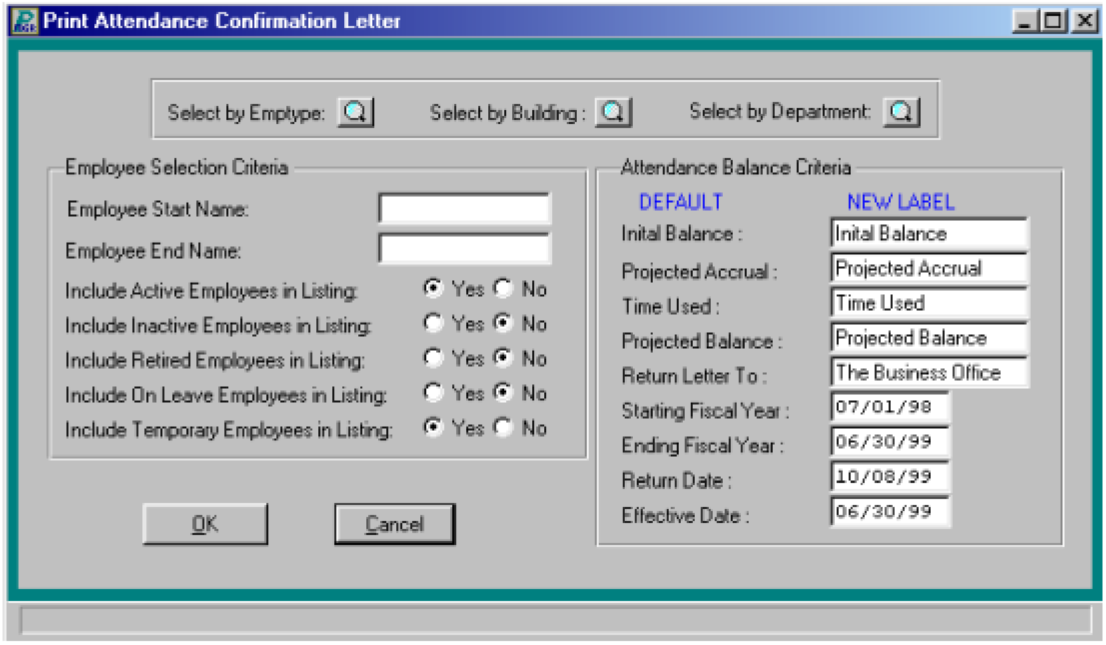
Printing Contract Letters



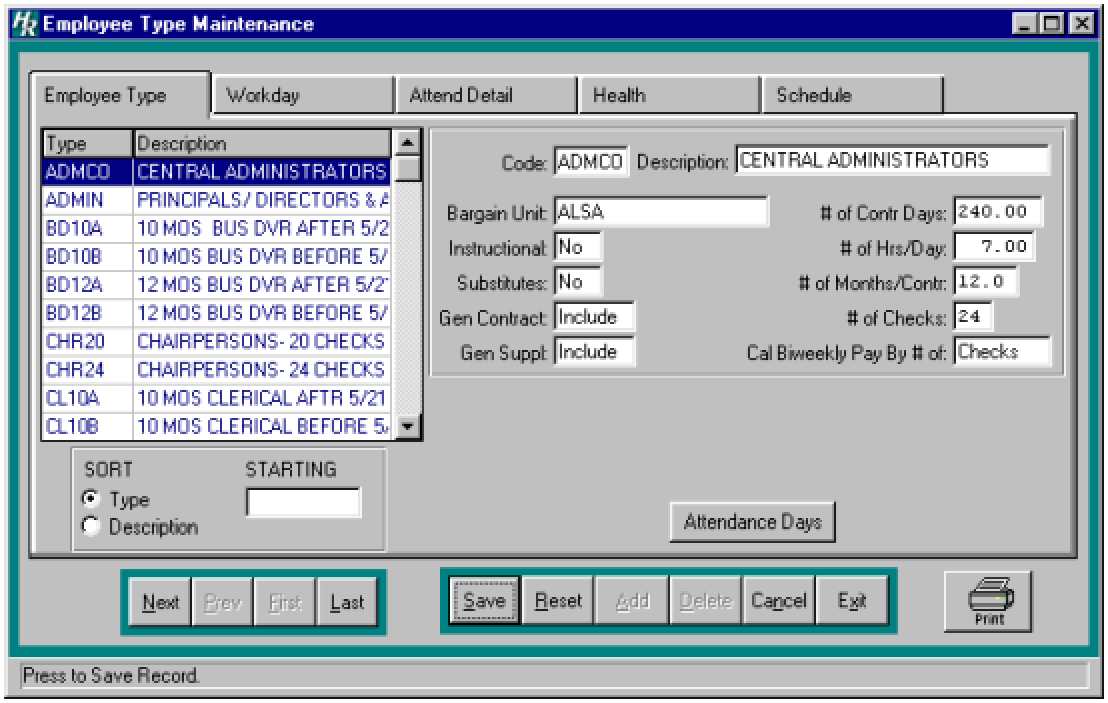
Move Information to Employee Information



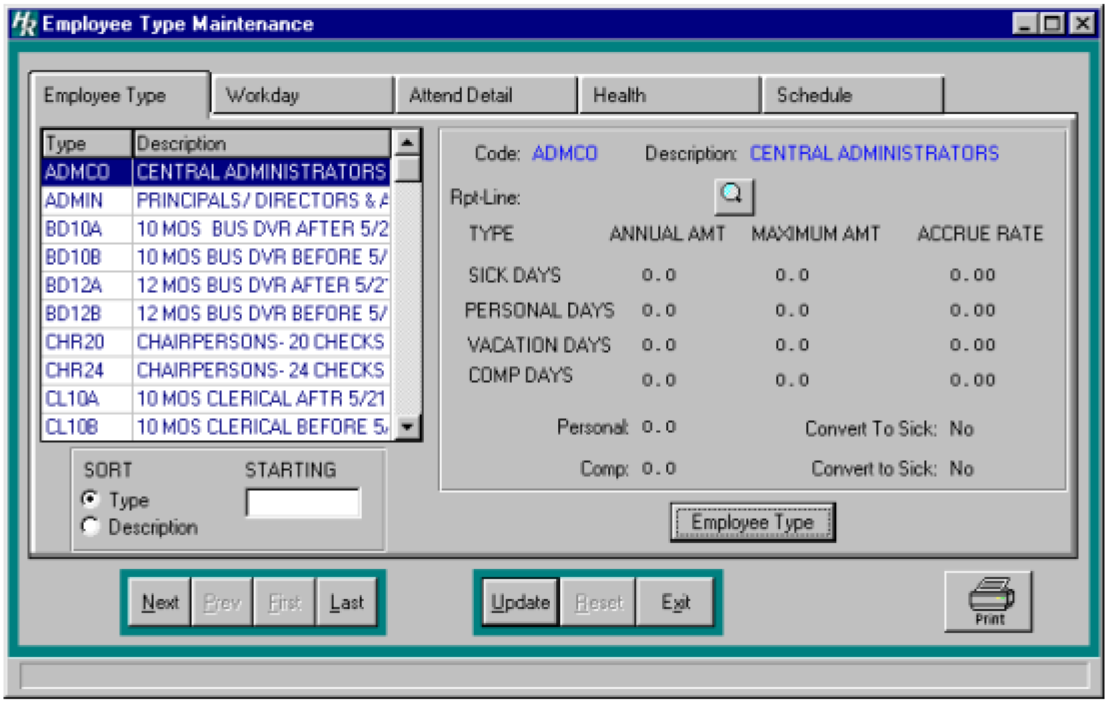
Attendance Confirmation Letters



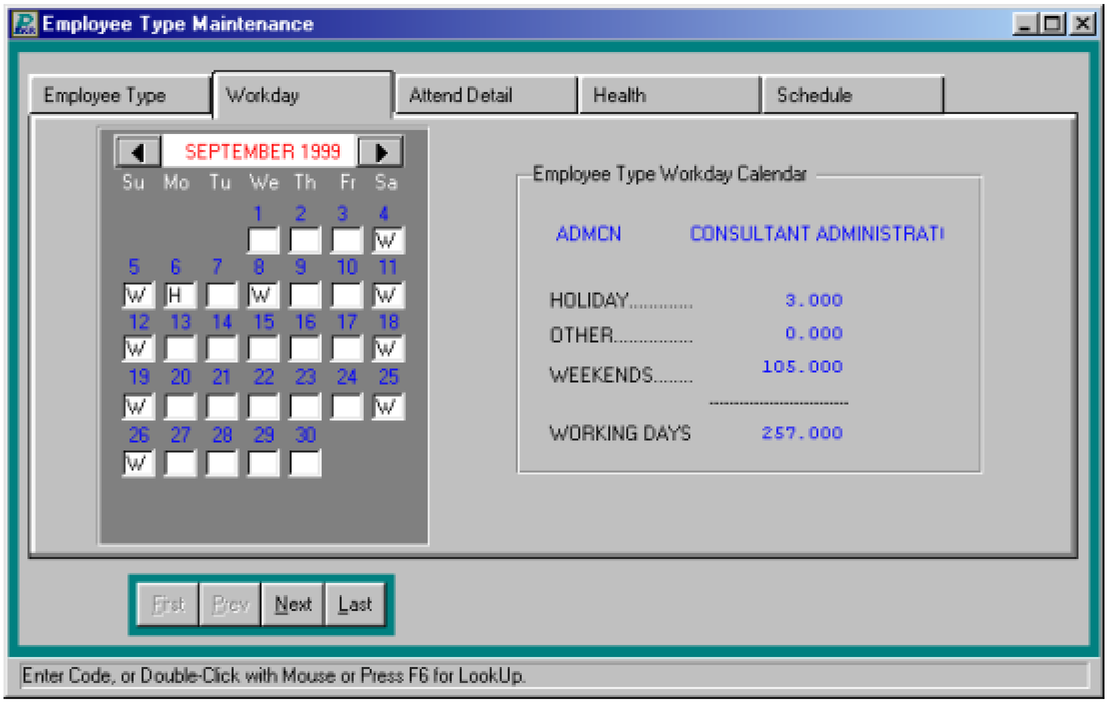
Employee Types



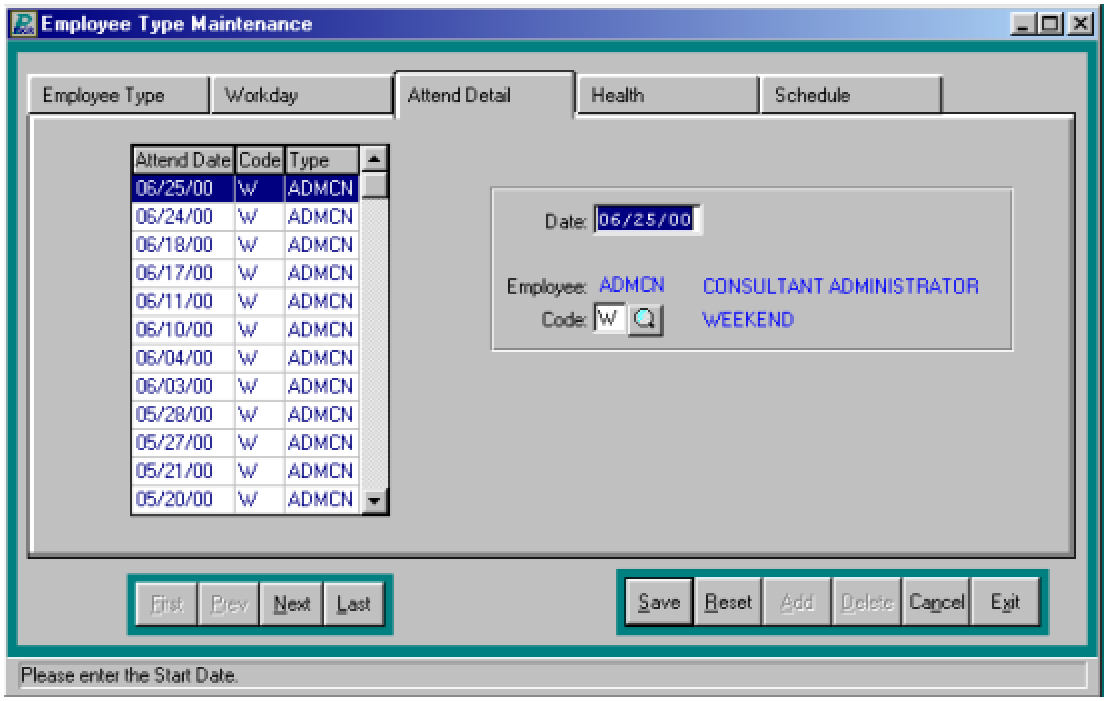
Attendance Days



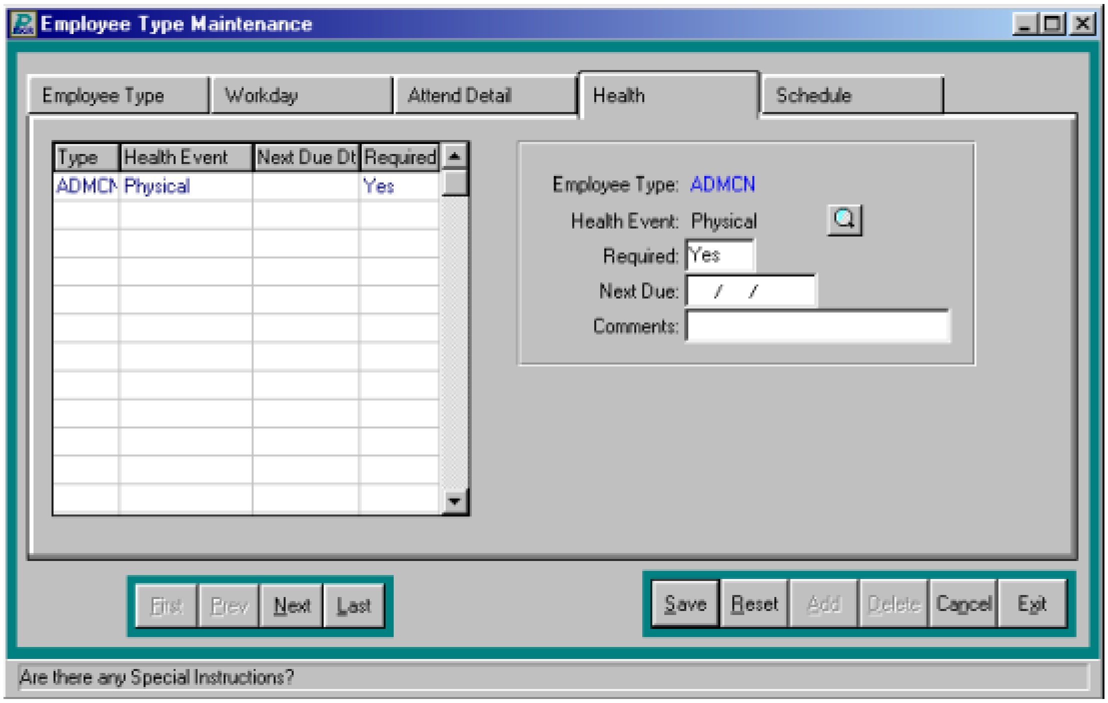
Workday Calendar



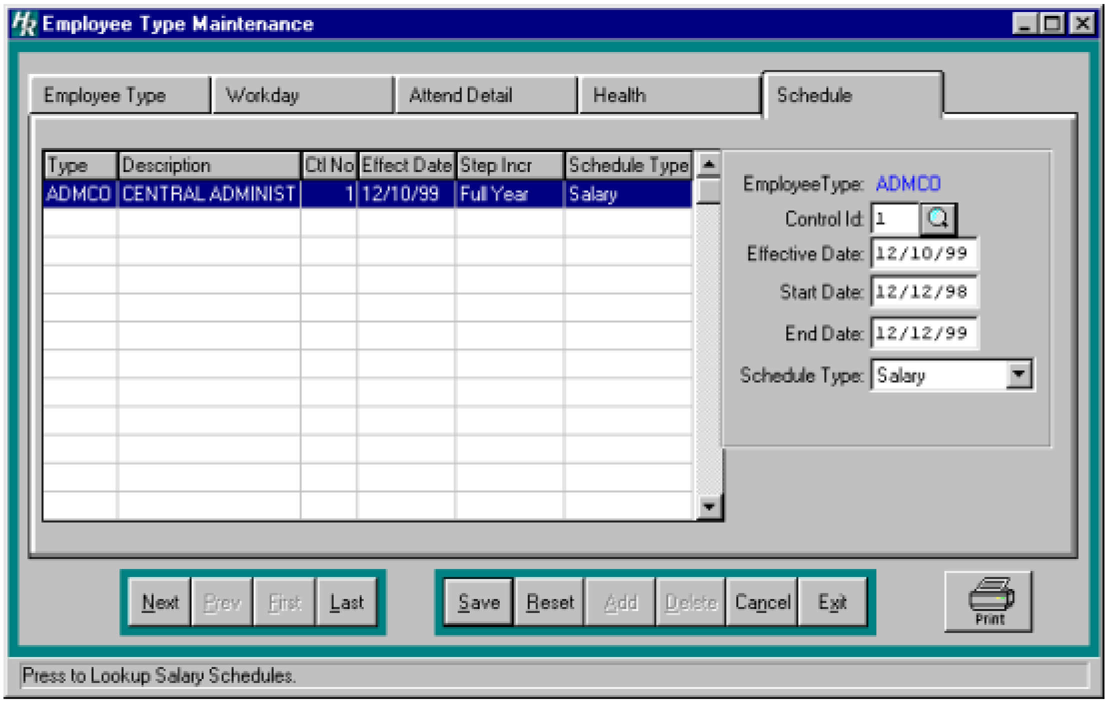
Attendance Detail



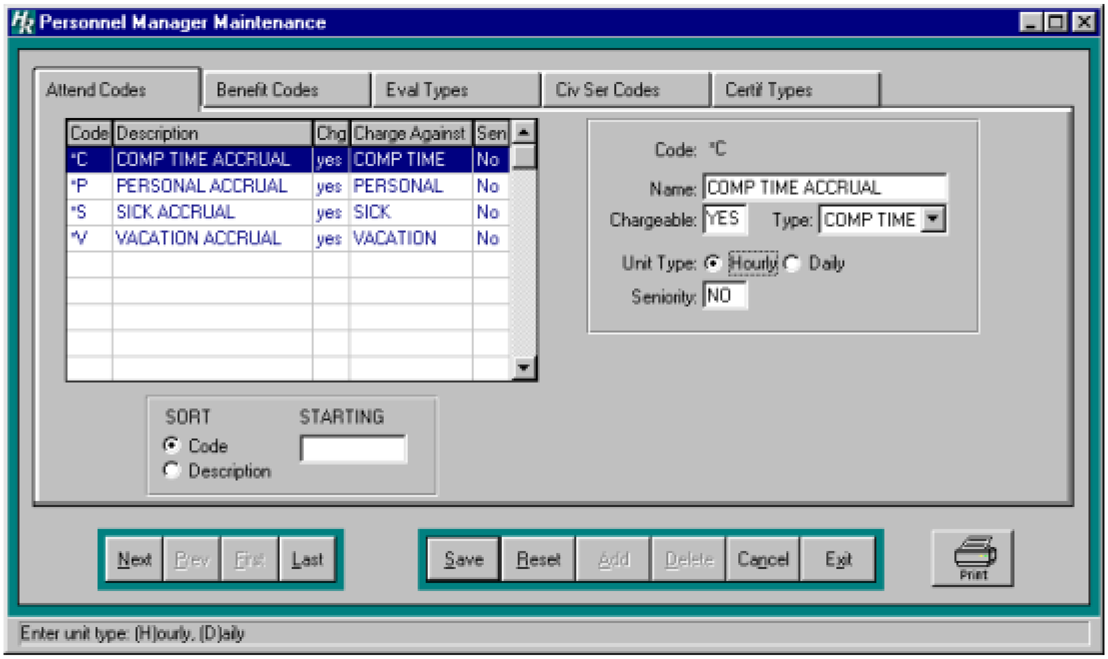
Employee Type Health



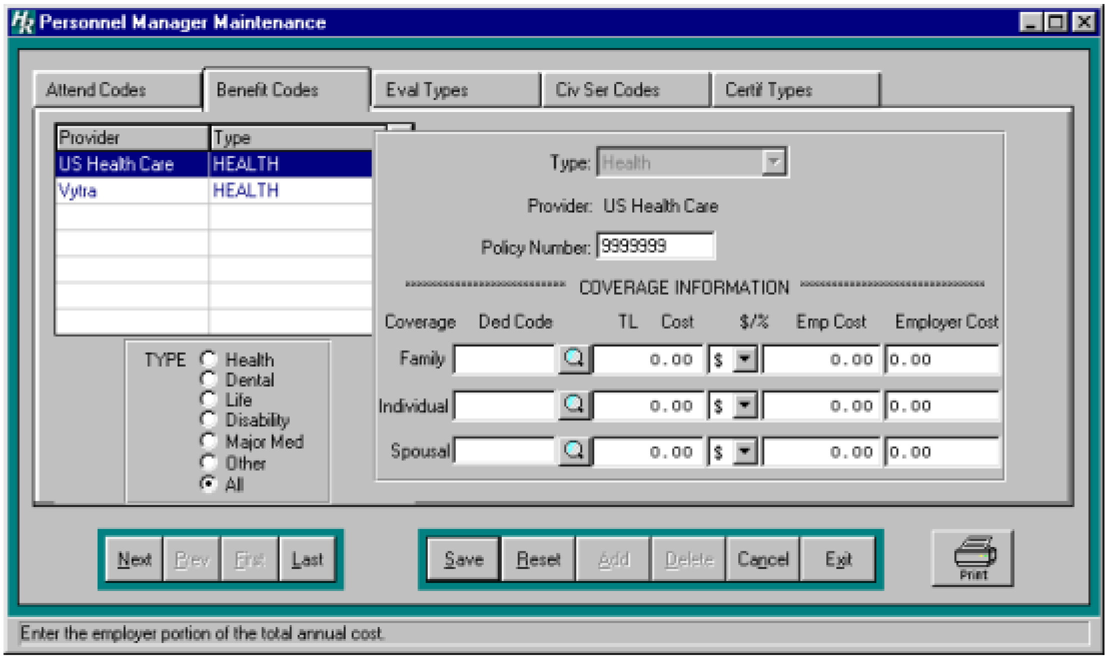
Salary Schedule



Attendance Codes



Benefit Codes



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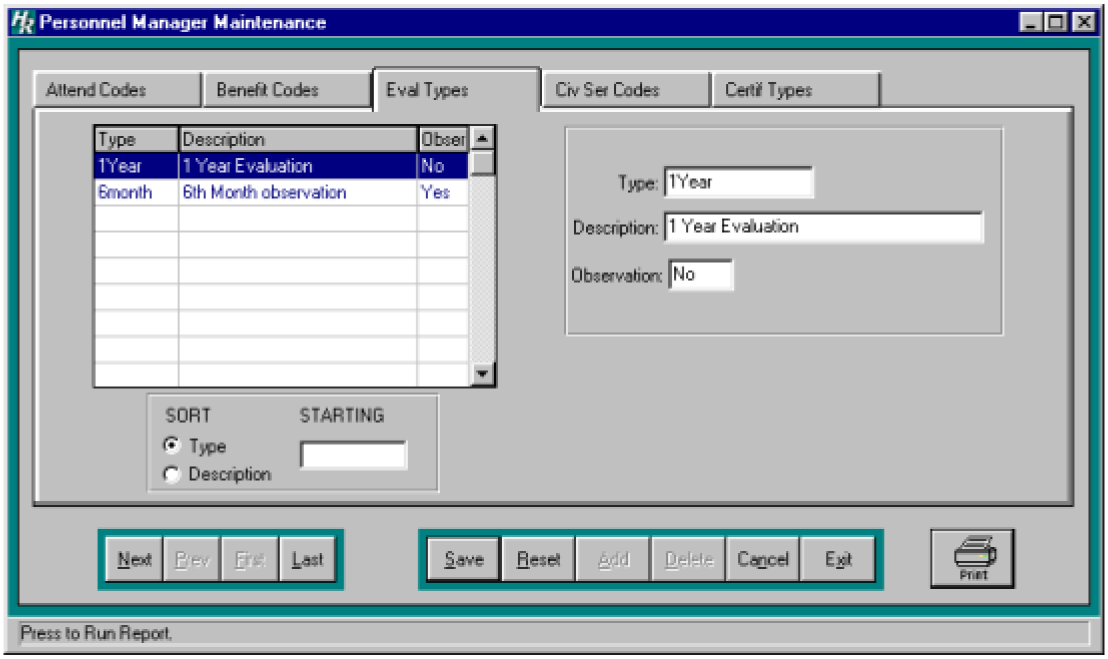
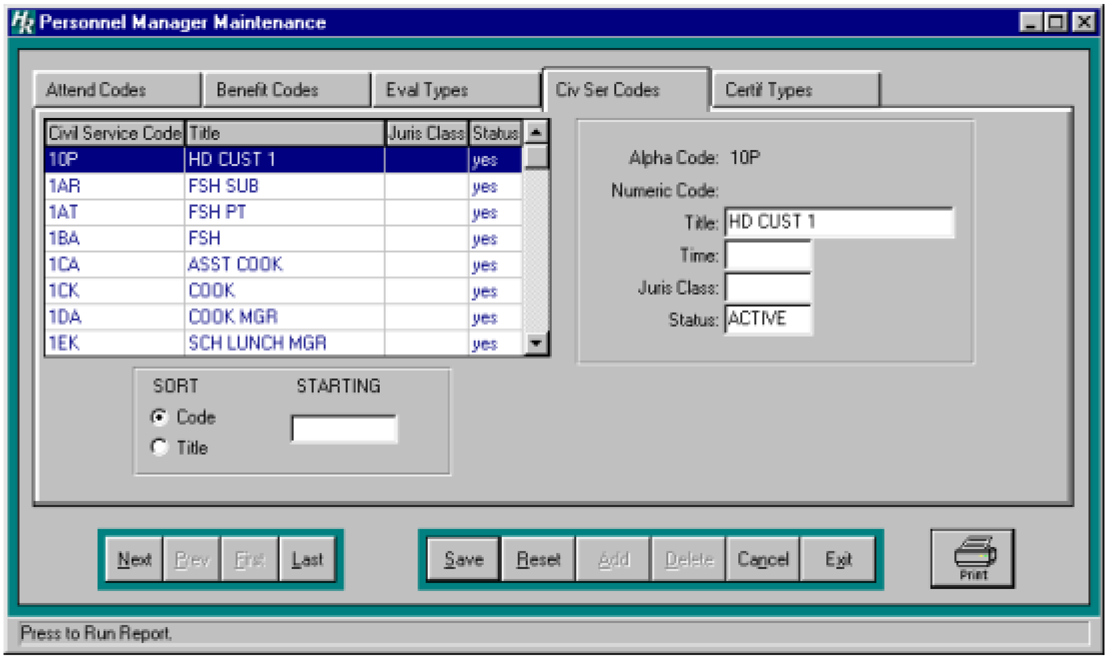
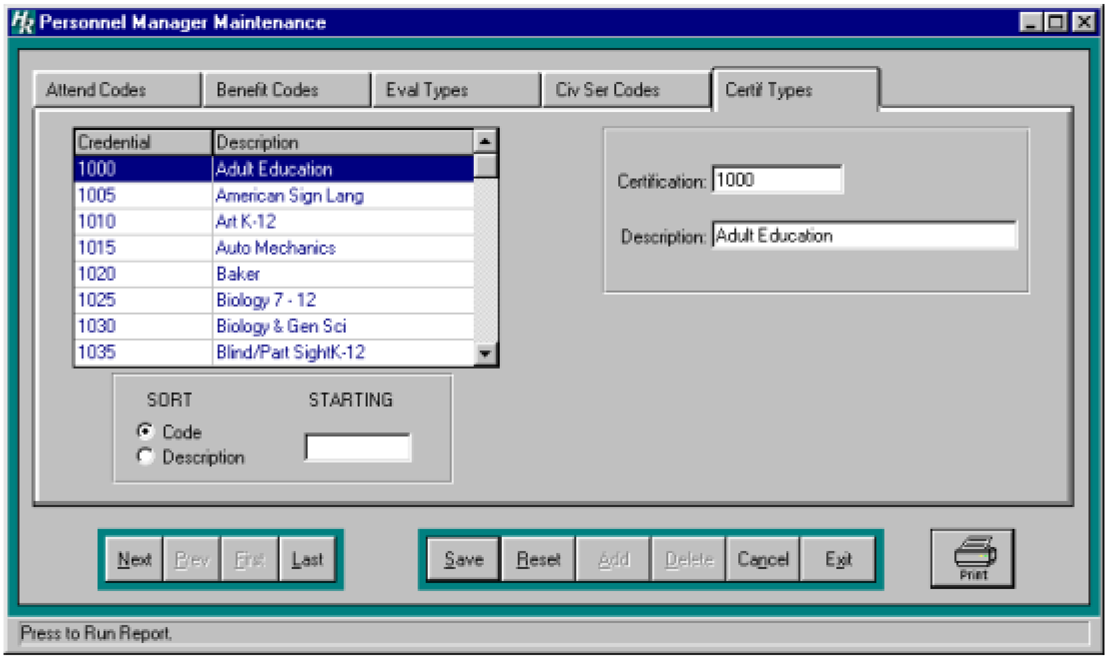


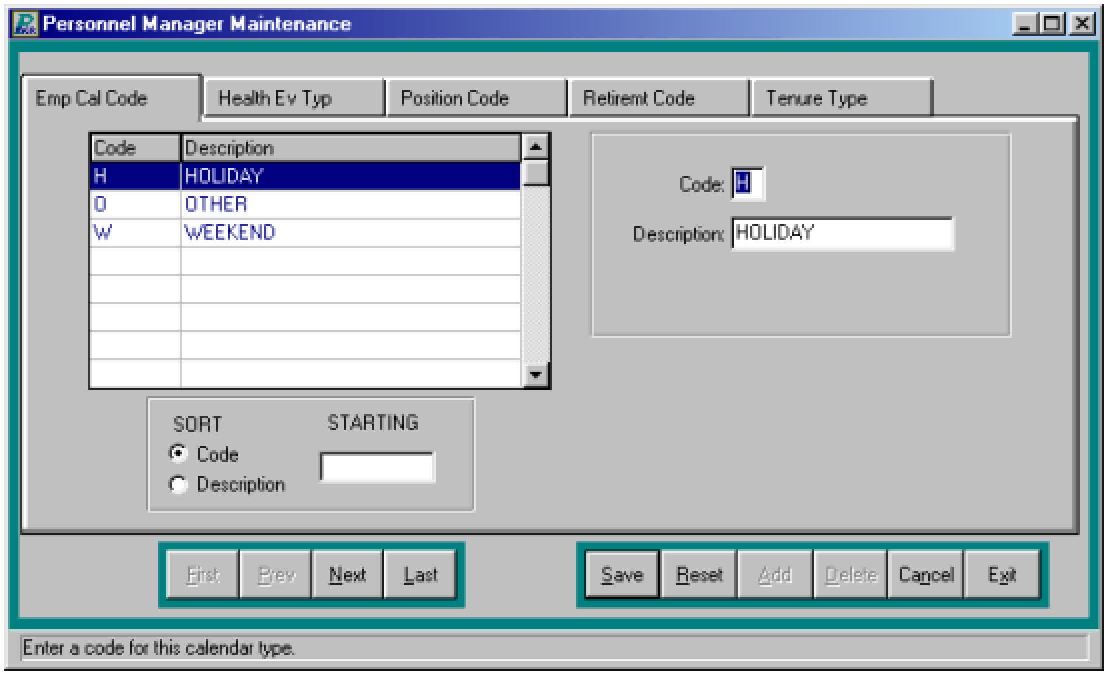
Civil Service Codes



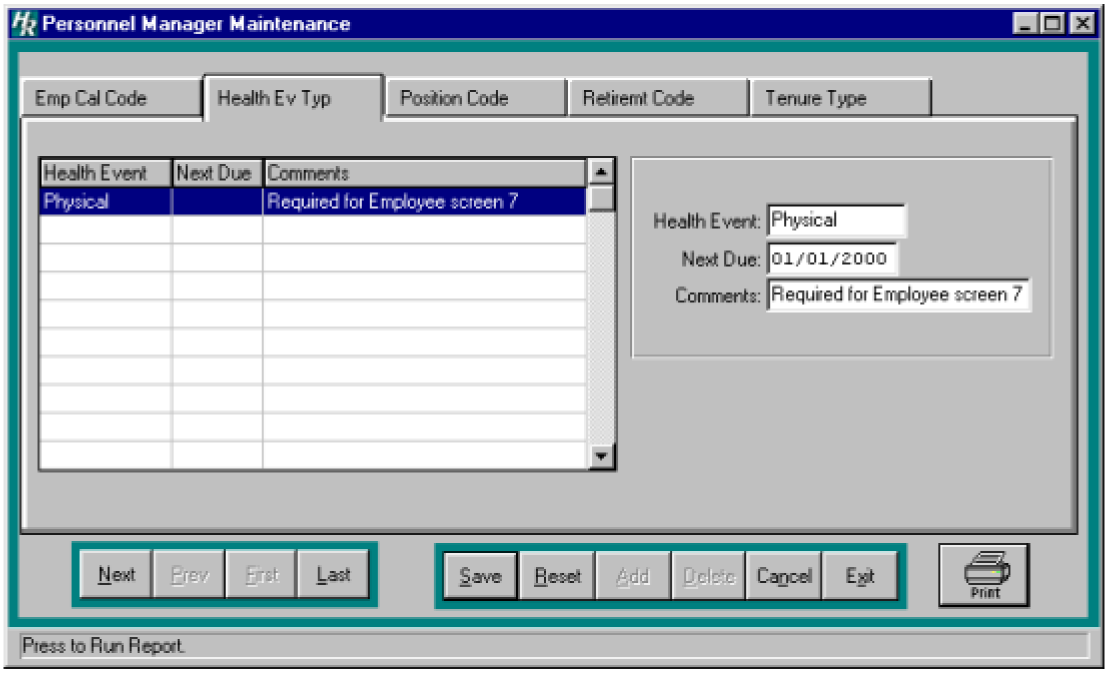
Certification Types



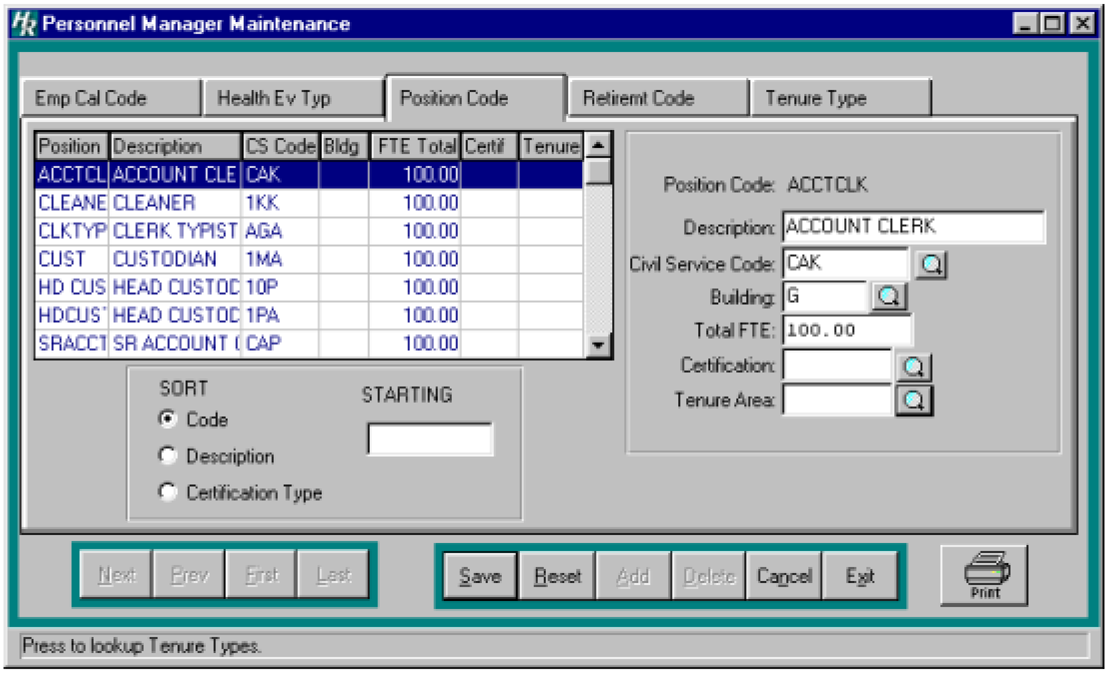
Employee Calendar Codes



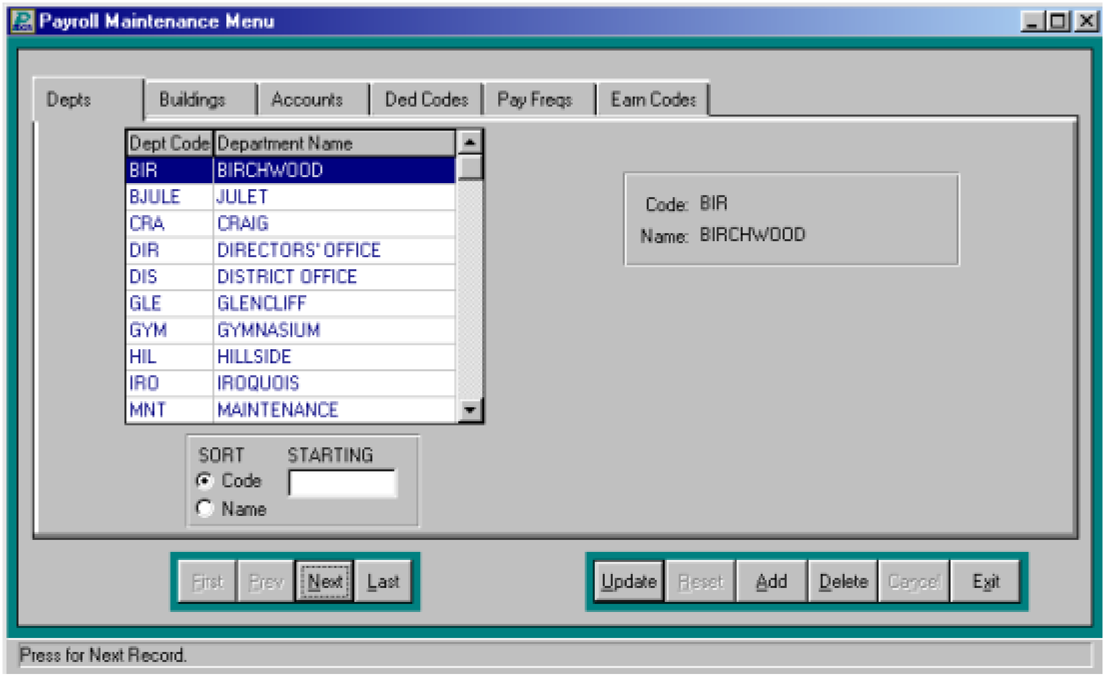
Health Event Types



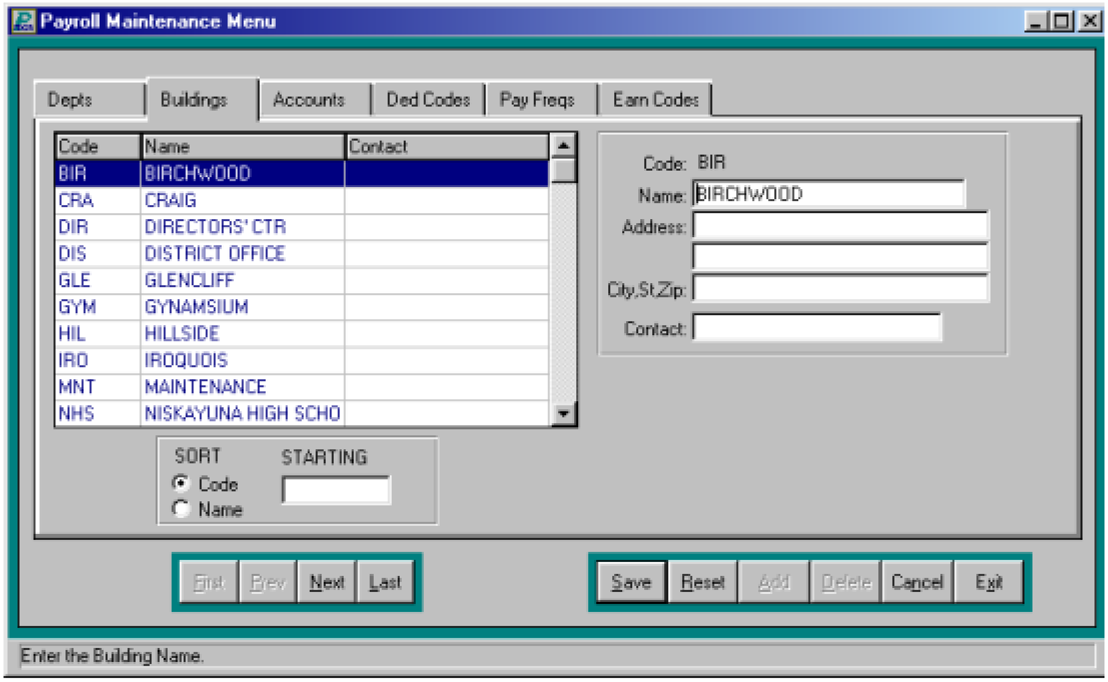
Position Codes



Departments



Buildings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Buildings
Accounts
Ded Codes
Pay Freqs
Earn Codes
Code
Name
Contact
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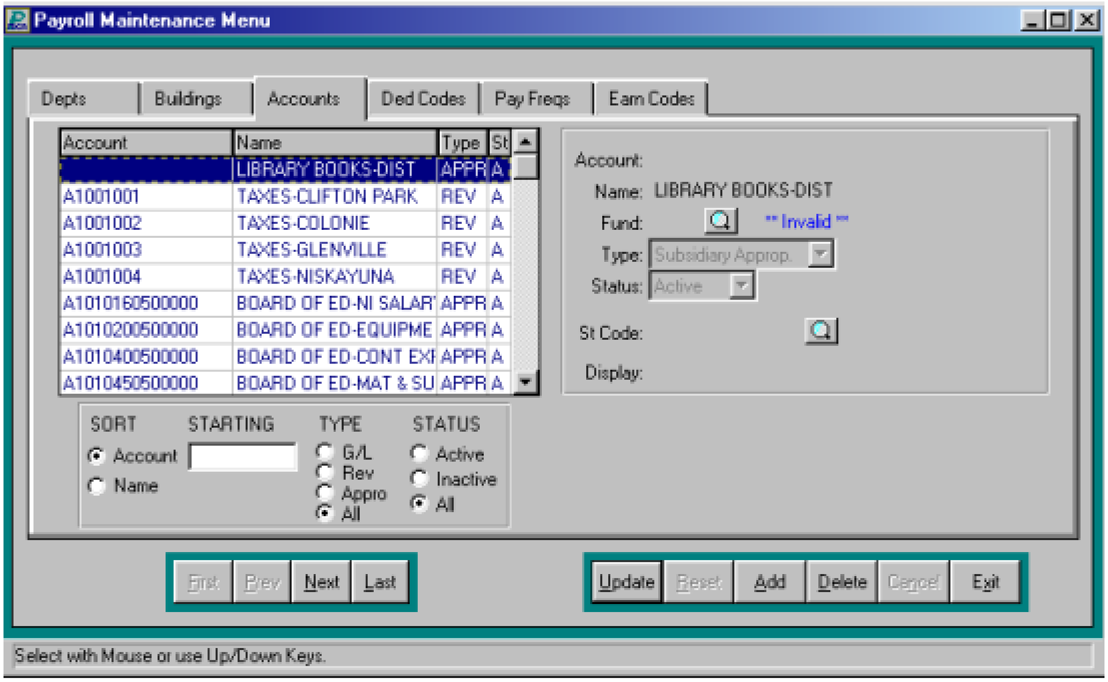
BIRCHWOOD
CRA
CRAIG
DIR
DIRECTORS' CTR
DIS
DISTRICT OFFICE
GLE
GLENCLIFF
GYM
GYNAMSIUM
HIL
HILLSIDE
IRO
IROQUOIS
MNT
MAINTENANCE
NHS
NISKAYUNA HIGH SCHO
Code: BIR
Name: BIRCHWOOD
Address:
City,St,Zip:
Contact:
SORT
STARTING
Code
Name
First
Prev
Next
Last
Save
Reset
Add
Delete
Cancel
Exit
Enter the Building Name.

Accounts


Payroll Maintenance Menu
Depts
Buildings
Accounts
Ded Codes
Pay Freqs
Earn Codes
Account
Name
Type
St
LIBRARY BOOKS-DIST APPR A
A1001001 TAXES-CLIFTON PARK REV A
A1001002 TAXES-COLONIE REV A
A1001003 TAXES-GLENVILLE REV A
A1001004 TAXES-NISKAYUNA REV A
A1010160500000 BOARD OF ED-NI SALAR APPR A
A1010200500000 BOARD OF ED-EQUIPME APPR A
A1010400500000 BOARD OF ED-CONT EX APPR A
A1010450500000 BOARD OF ED-MAT & SU APPR A
Account:
Name: LIBRARY BOOKS-DIST
Fund:
** Invalid **
Type: Subsidiary Approp.
Status: Active
St Code:
Display:
SORT
STARTING
TYPE
STATUS
Account
Name
G/L
Rev
Appro
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Inactive
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Prev
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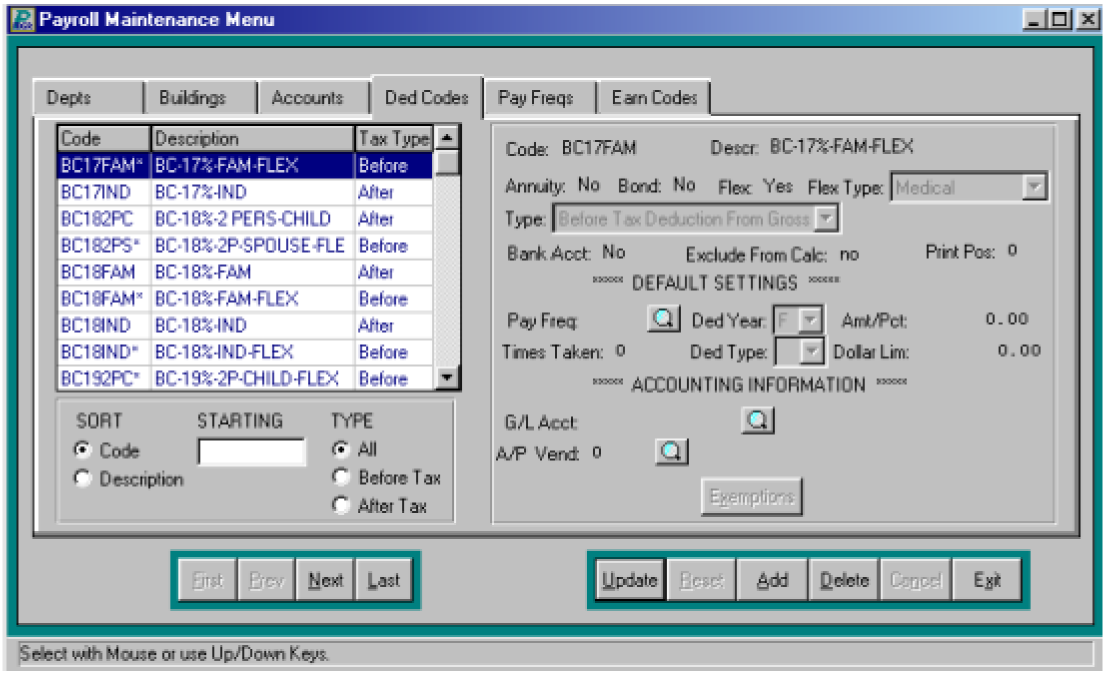
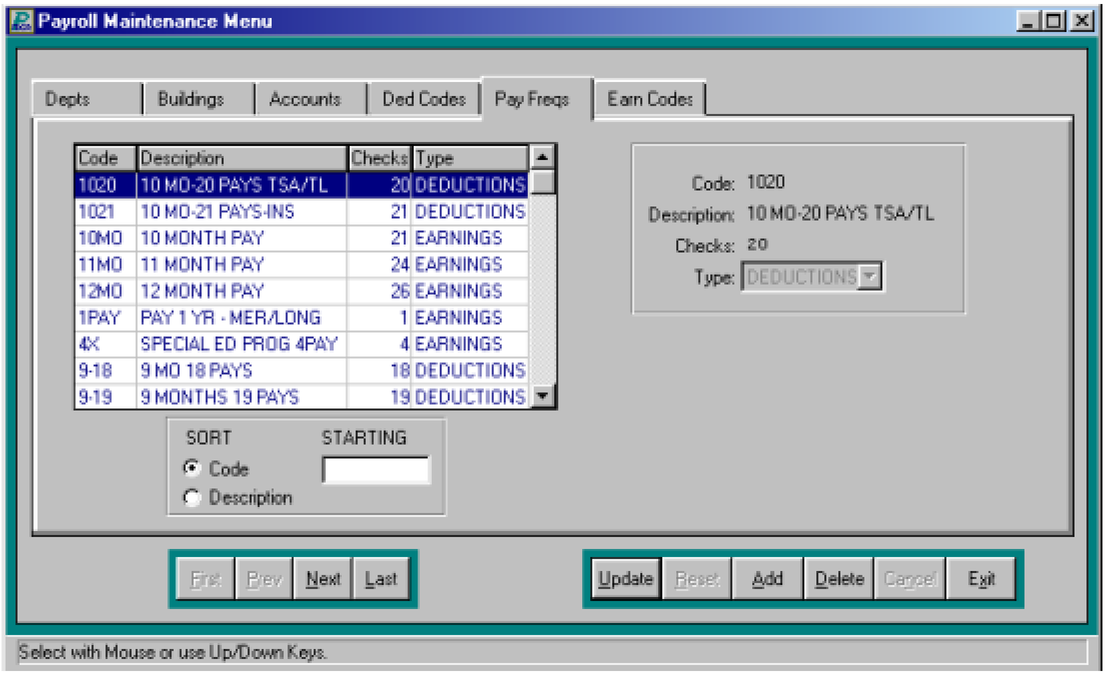
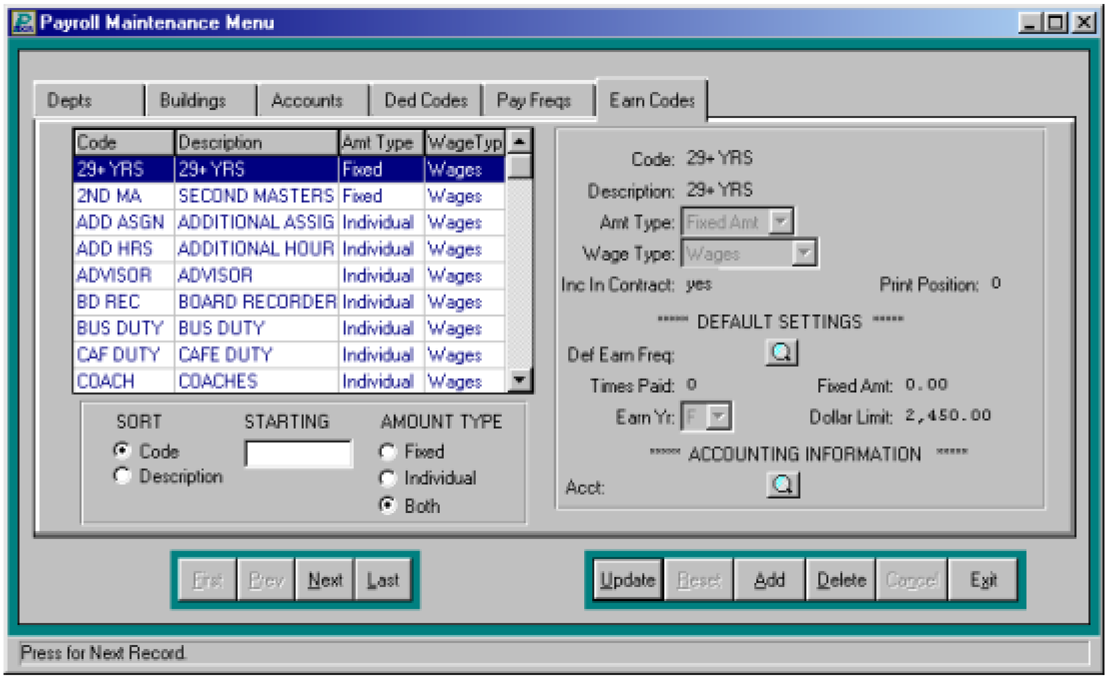
Deduction Codes



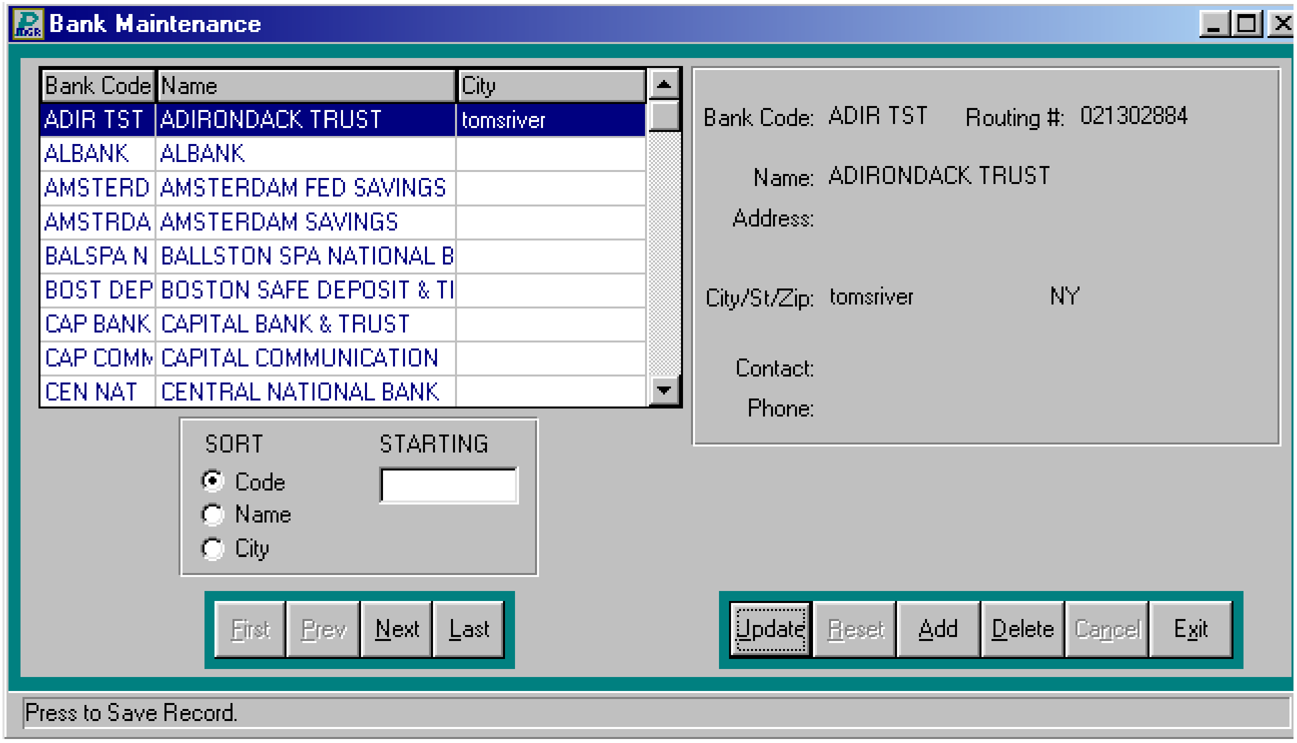
Pay Frequencies



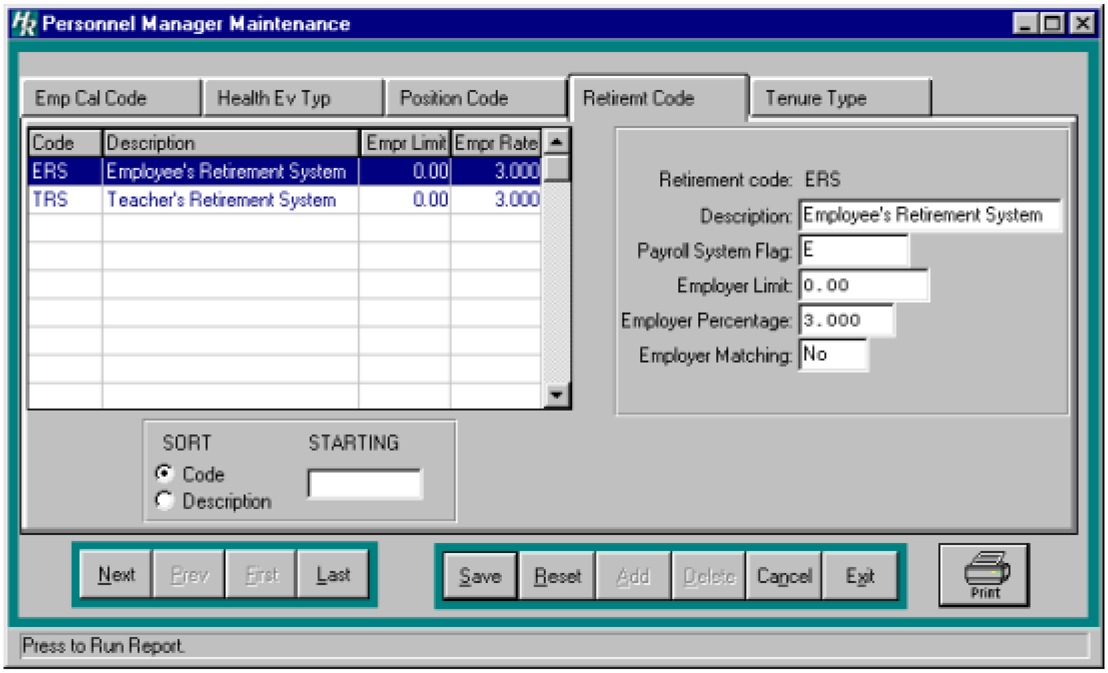
Earning Codes



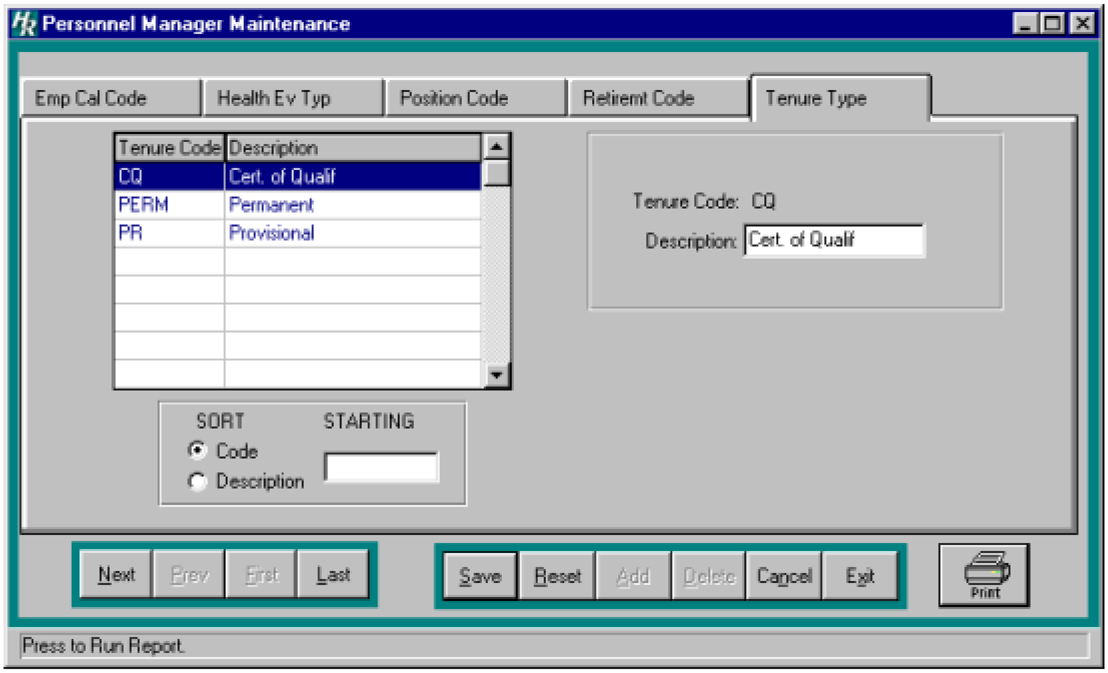
Direct Deposit Banks



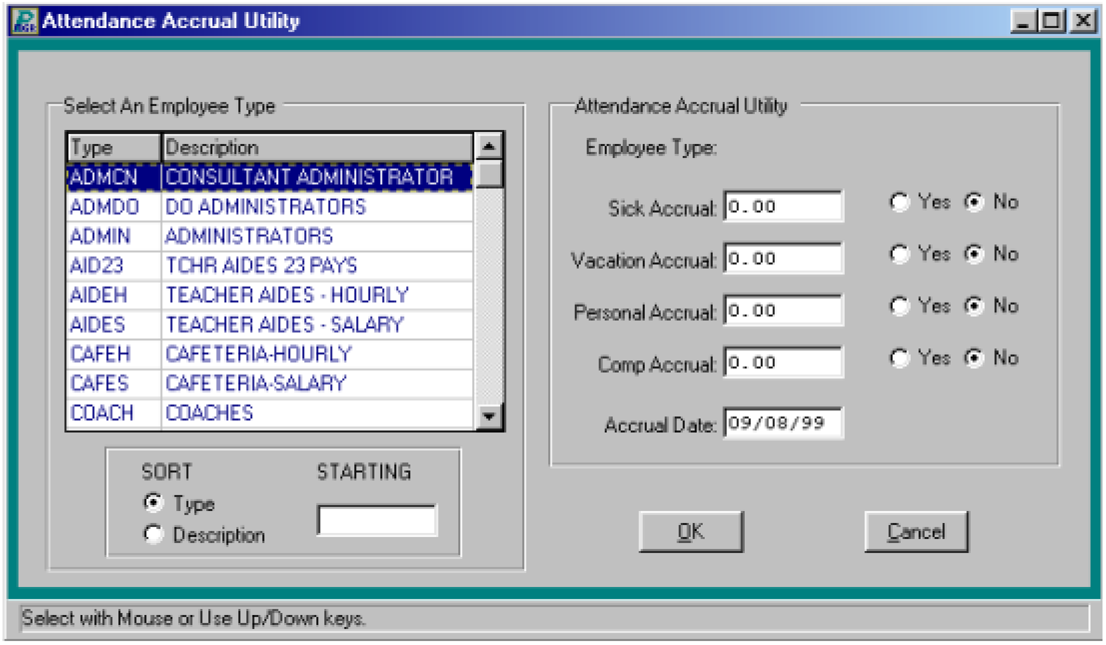
Retirement System Codes



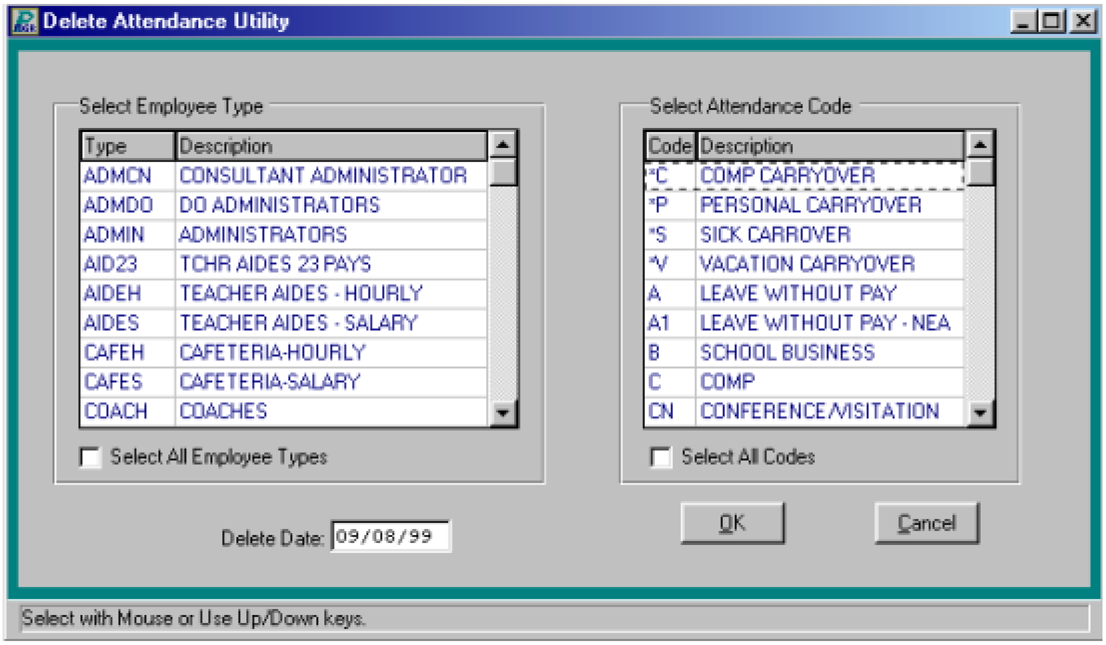
Tenure Area Types



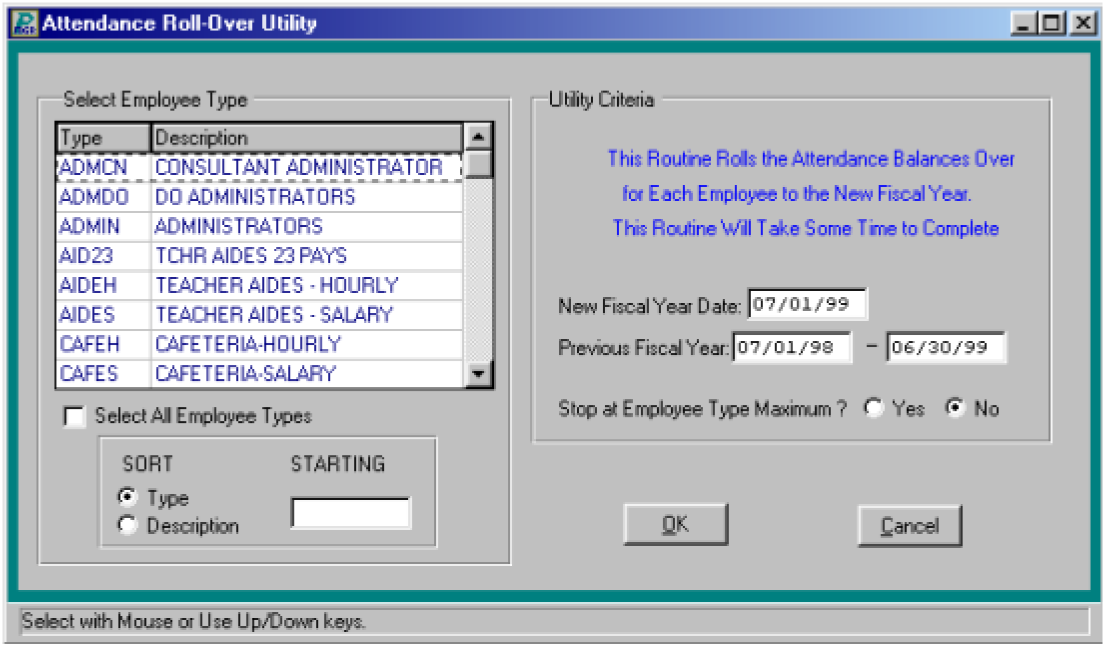
Attendance Accrual



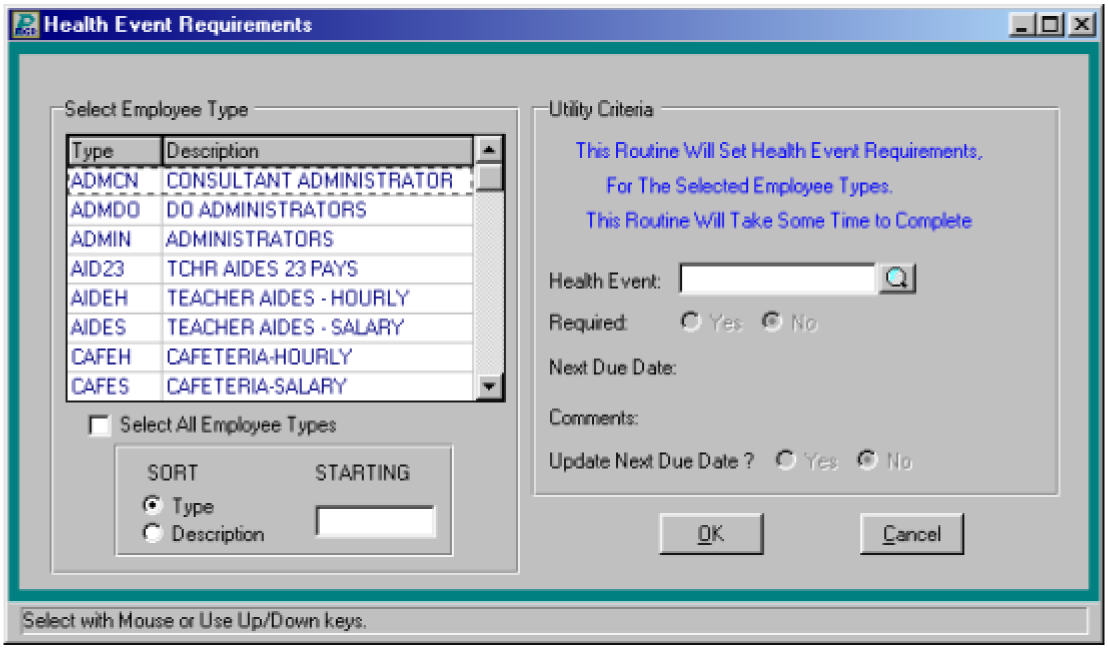
Delete Attendance Utility



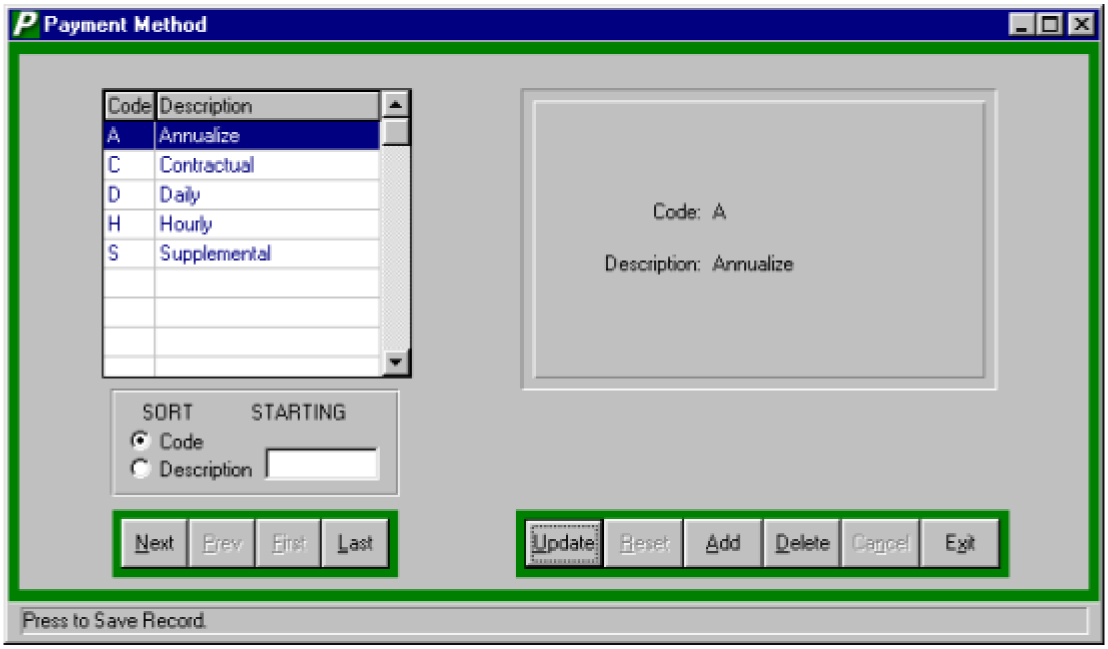
Attendance Balance Roll-Over



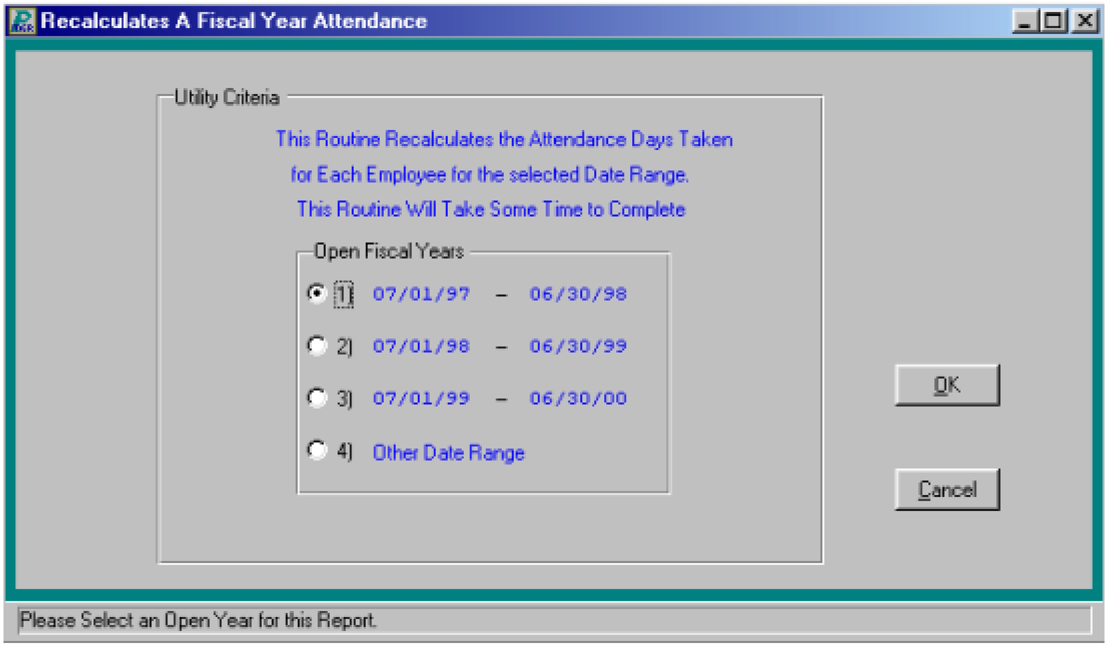
Health Event Requirement



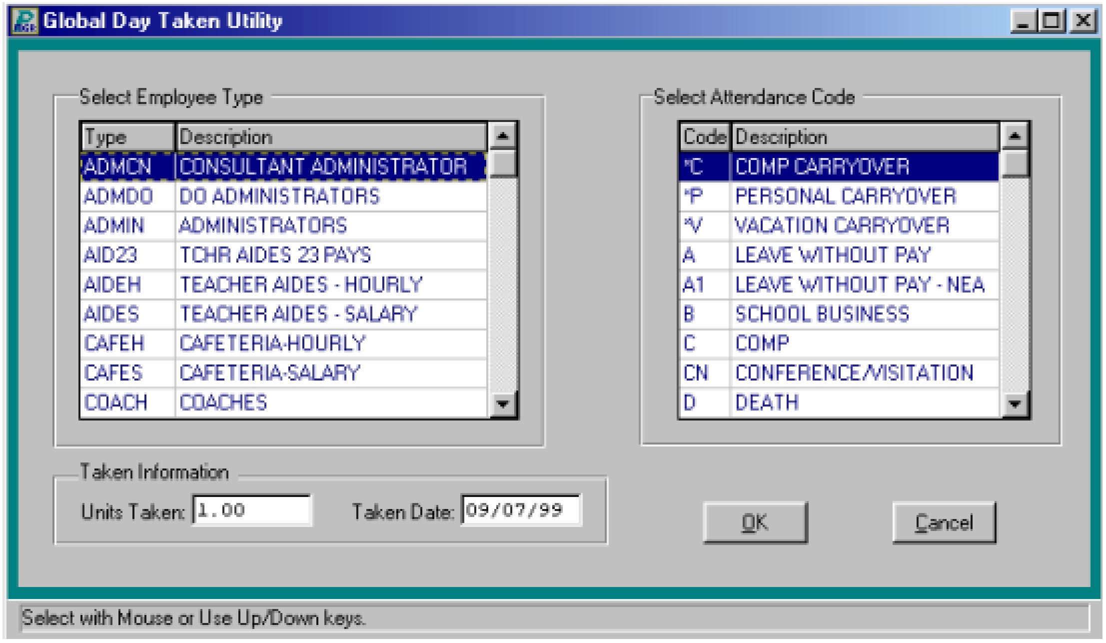
Payment Method



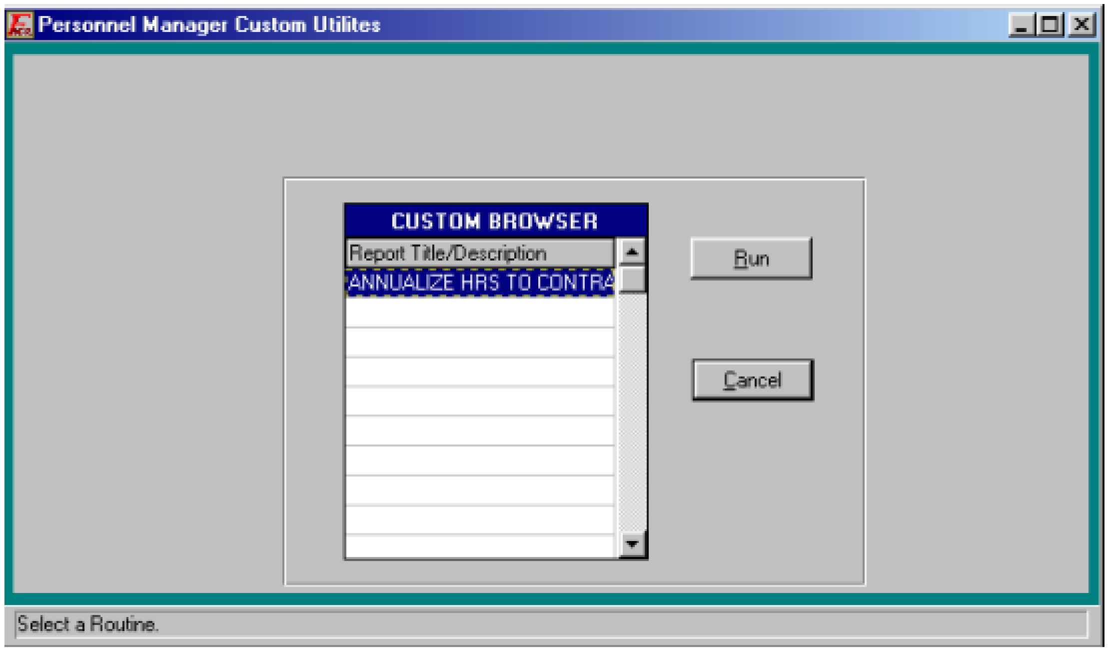
Re-Calculate Attendance Taken Amounts



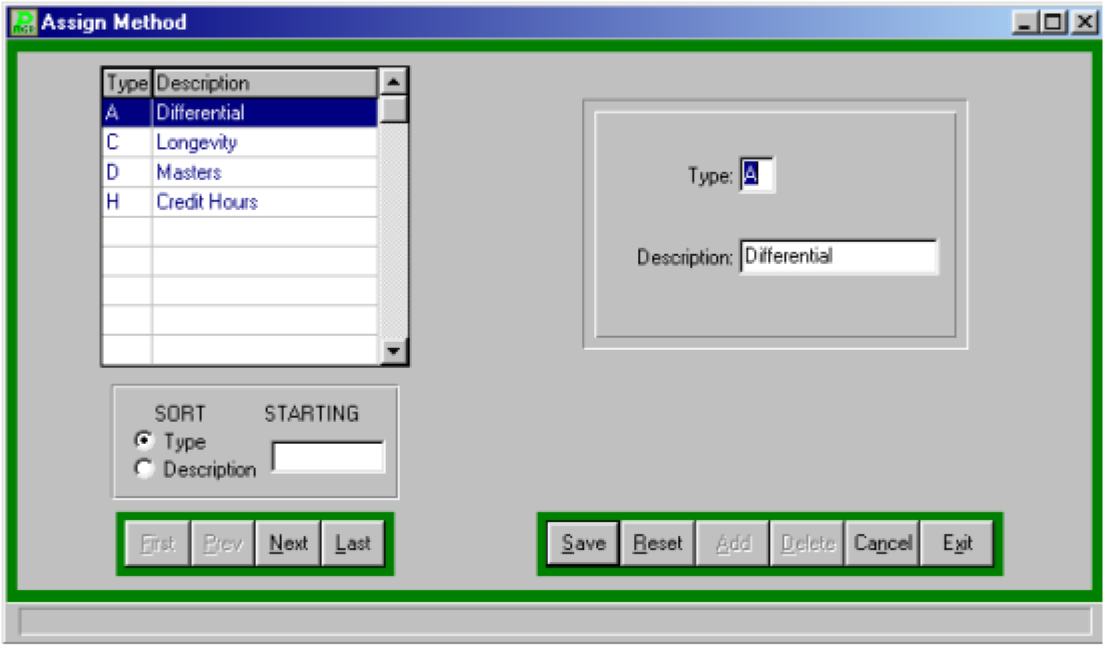
Record Global Attendance



Custom Utilities



Assignment Method



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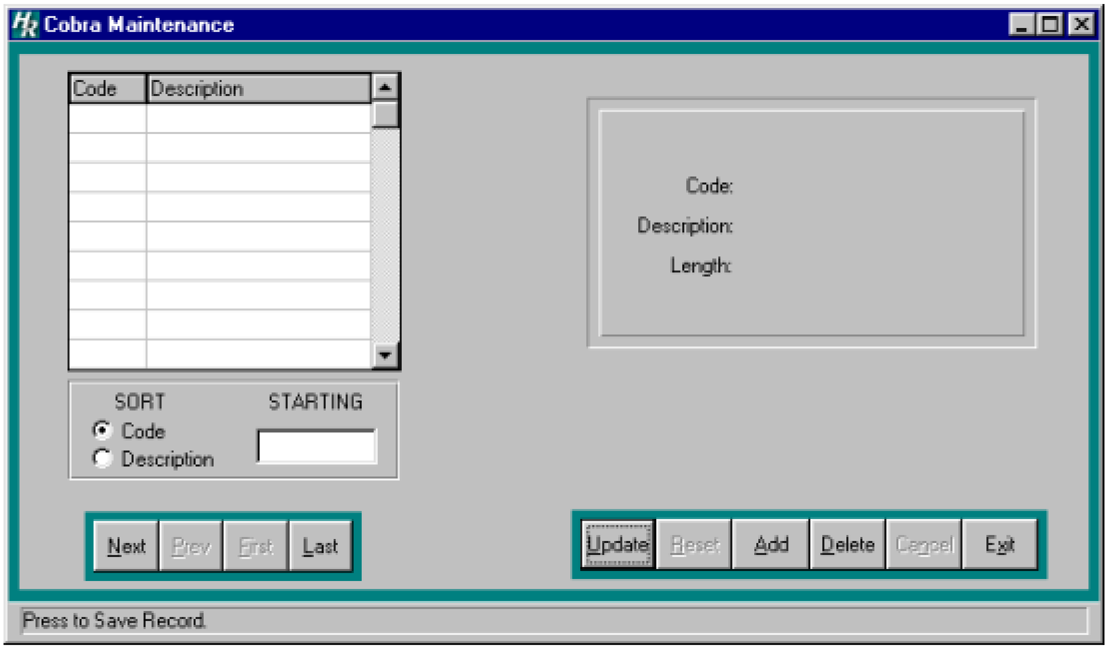

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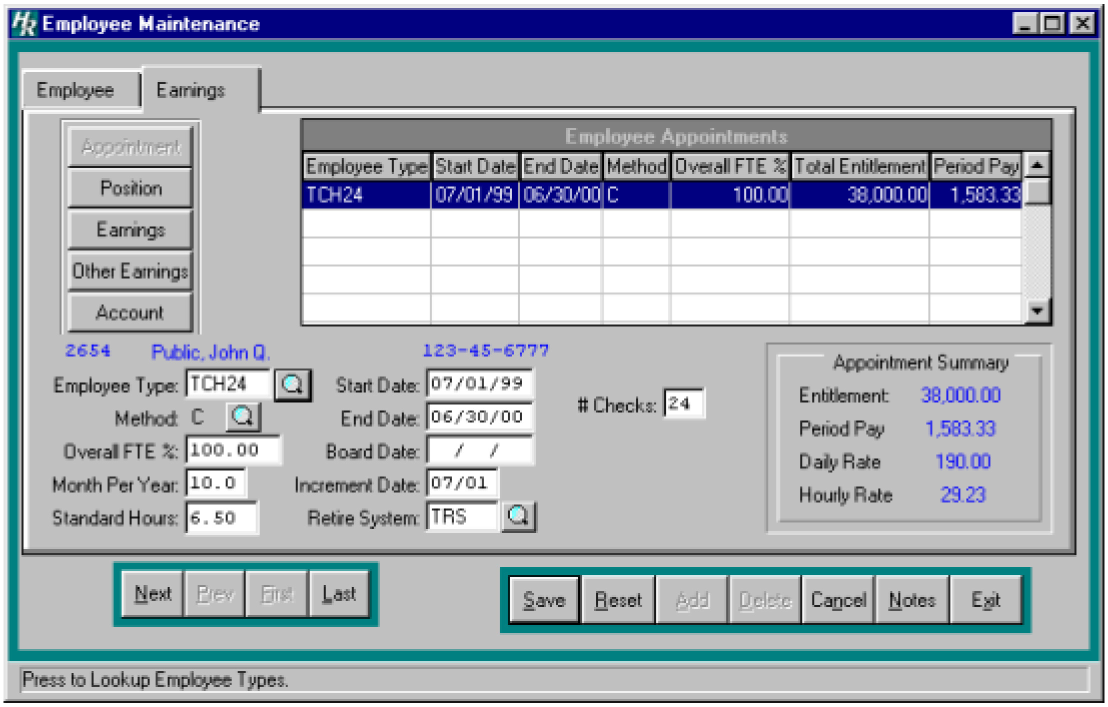
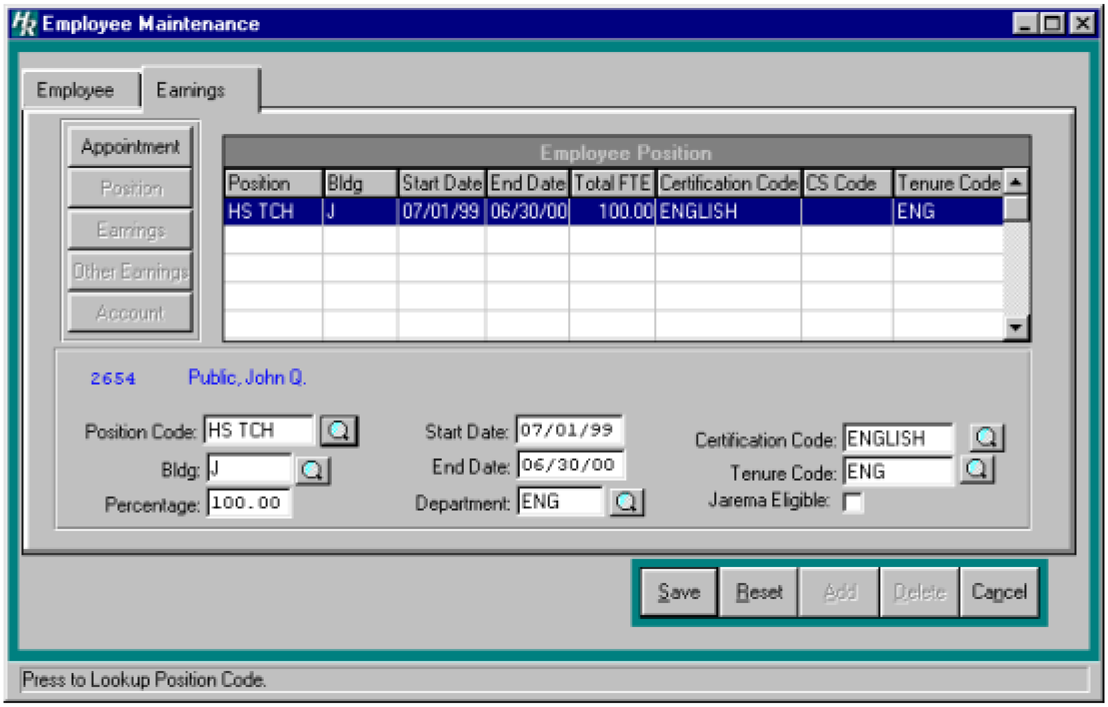


Position



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
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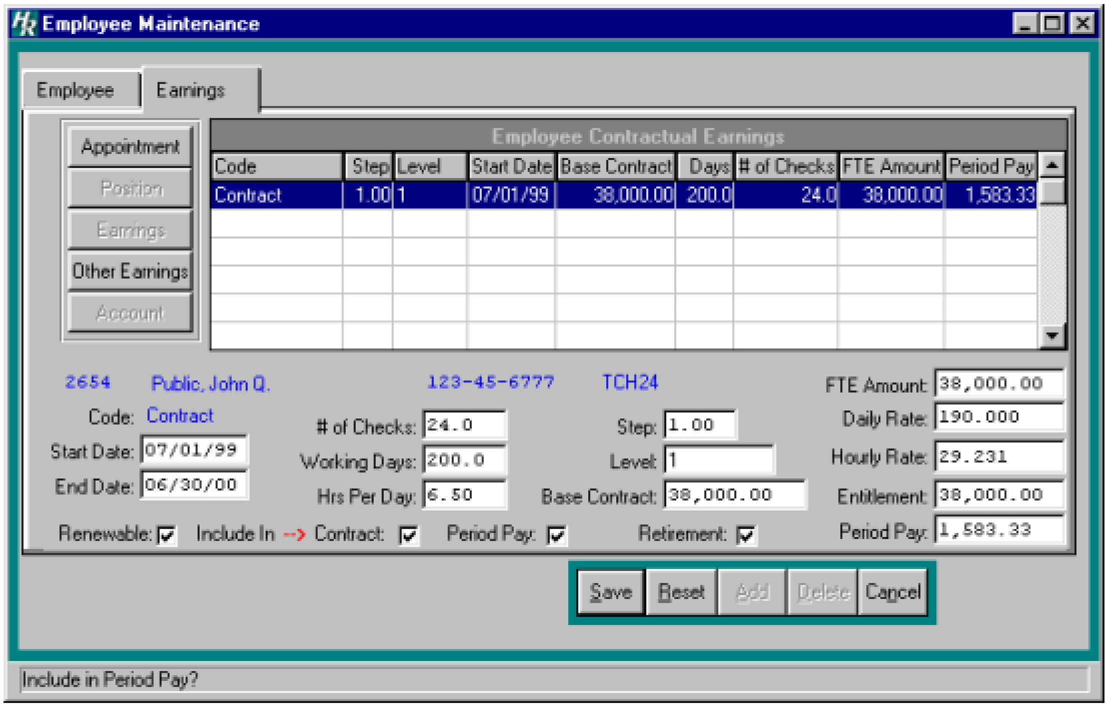
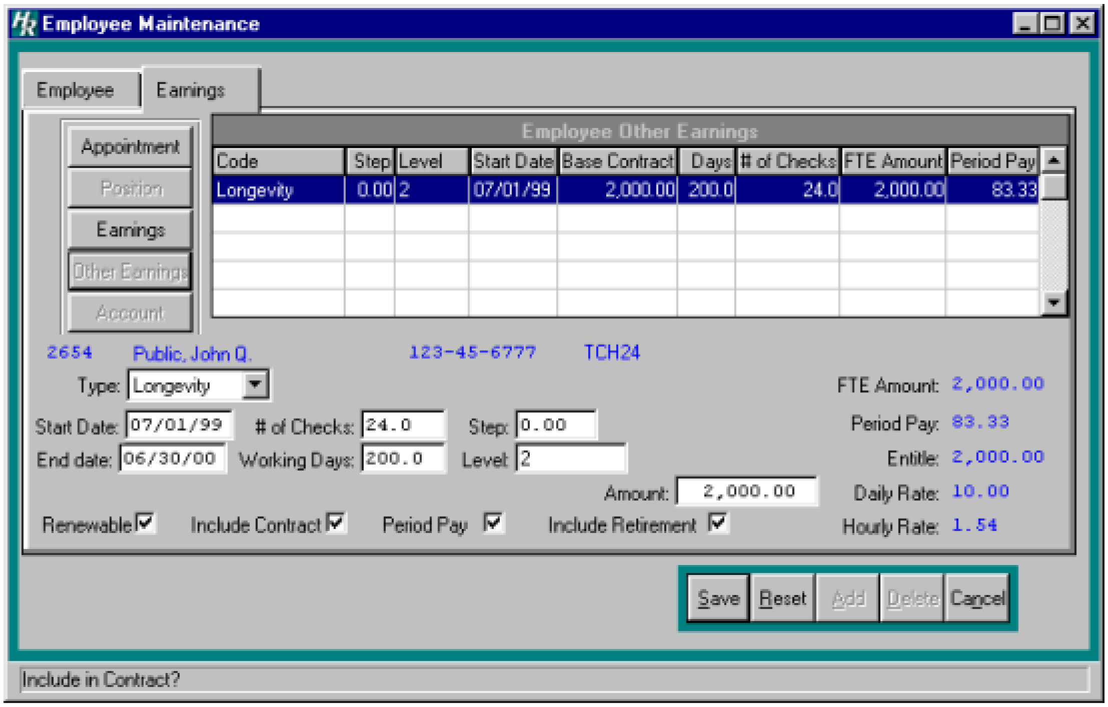
07/01/99
06/30/00
100.00
ENGLISH
ENG
2654
Public, John Q.
Position Code:
HS TCH
Bldg:
J
Percentage:
100.00
Start Date:
07/01/99
End Date:
06/30/00
Department:
ENG
Certification Code:
ENGLISH
Tenure Code:
ENG
Jarema Eligible:
Save
Reset
Add
Delete
Cancel
Press to Lookup Position Code.

Earnings

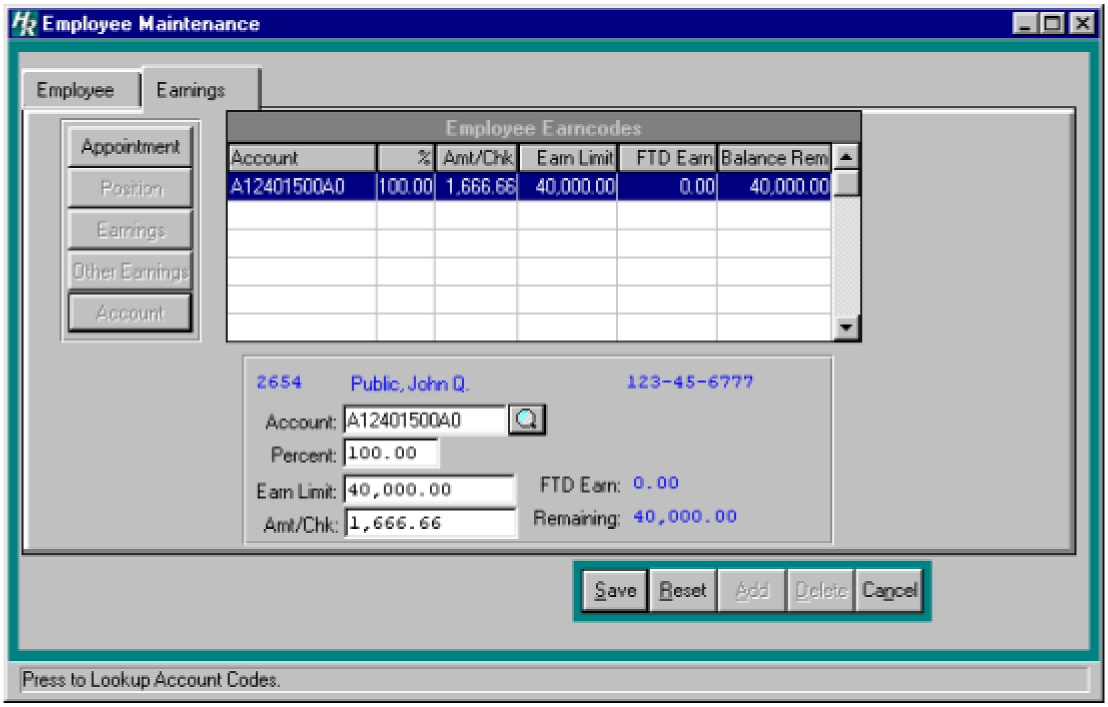


Employee Maintenance
Employee
Earnings
Appointment
Position
Earnings
Other Earnings
Account
Employee Contractual Earnings
Code
Step
Level
Start Date
Base Contract
Days
# of Checks
FTE Amount
Period Pay
Contract
1.00
1
07/01/99
38,000.00
200.0
24.0
38,000.00
1,583.33
2654
Public, John Q.
123-45-6777
TCH24
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?

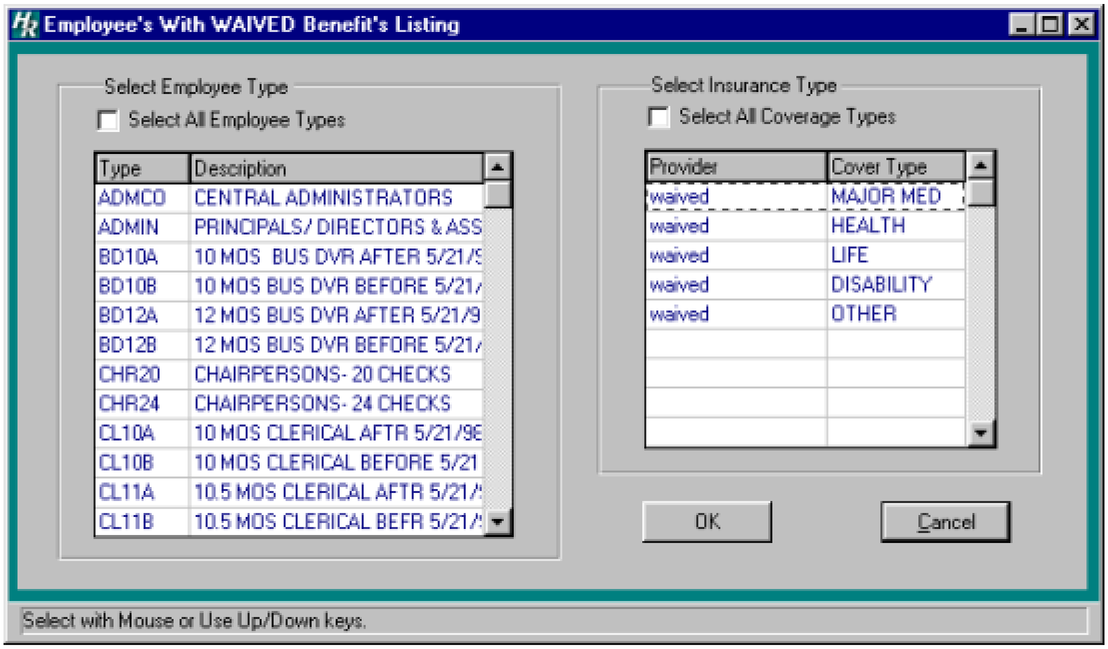
Other Earnings



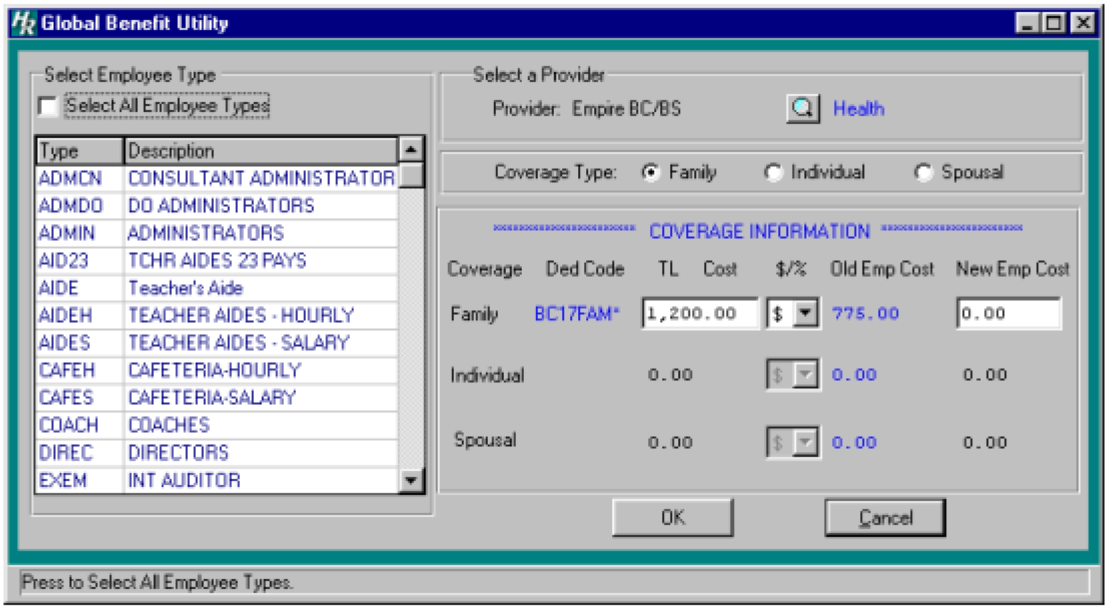
Account


Employee Maintenance
Employee
Earnings
Appointment
Position
Earnings
Other Earnings
Account
Employee Earncodes
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:
A12401500A0
Percent:
100.00
Earn Limit:
40,000.00
FTD Earn:
0.00
Amt/Chk:
1,666.66
Remaining:
40,000.00
Save
Reset
Add
Delete
Cancel
Press to Lookup Account Codes.

Employee's Benefit's Waived



Global Benefit Utility



Bargin Unit Maintenance