Charter/Contracted Emp Info

The Charter/Contracted Employee tab is part of the Human Resources' Employee module. This additional step to an employee's information could make all of the difference in state reporting for all districts; the Charter/Contracted Employee tab also aids in the calculations and tracking of Payroll, Benefits, and more. For more details on definition and regulations, visit the Florida Department of Education's Staff Information System.

Navigation and Search for an Employee

1. From the **Human Resources** menu, click **Employee**.



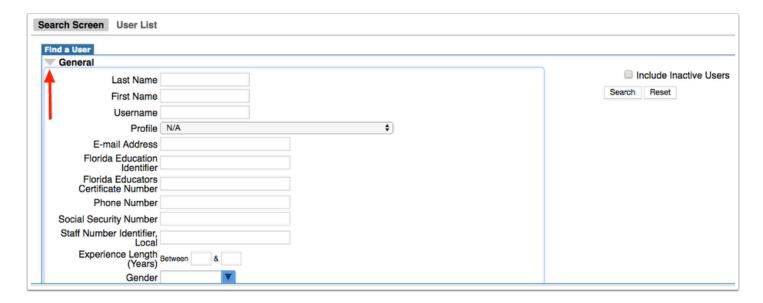
Clicking Employee navigates to the Demographic tab and bring up a Search Screen. There are several different ways to search and find an employee.



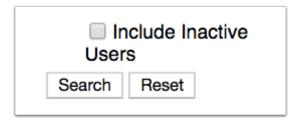
- You can search for employees from the **Jobs** tab, the **Deductions** tab, **Pay History**, or the **Files** tab as well depending on what information you want to pull.
- **2.** Type the employee's name or part of their name in the **User** search box.



3. To add additional search items, click **More Search Options**. Here you can add search items in the General section, Teachers section, Employee Demographic section, W4 Information section, the Communications Log, Charter/Contracted Emp Info section, and the State Reporting section. Click the gray arrow next to each section to open the search fields.

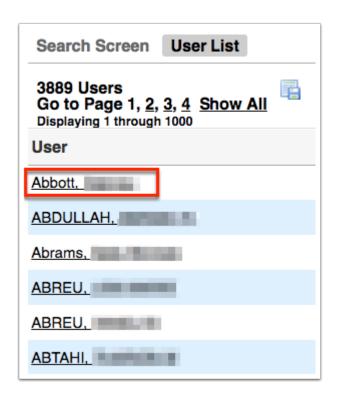


- **4.** To **Include Inactive Users** in your search, select the corresponding check box.
- **5.** Click **Search**. Click Reset to clear any information input in More Search Options to start over. Note: This only takes effect prior to clicking the Search button.



For more information on conducting an employee search, see <u>Searching for an Employee</u>.

6. Click the **User** name to open user information.

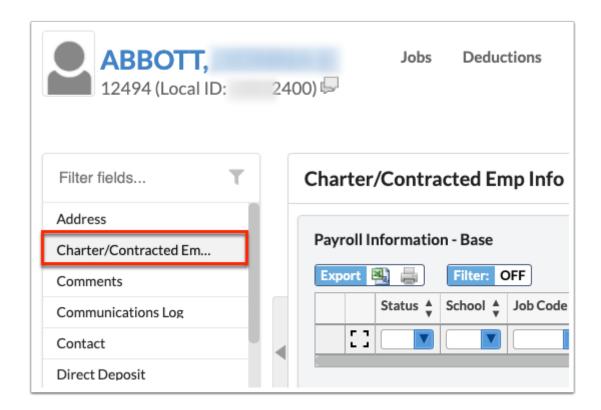


Once an employee is selected, to close the employee and search for a new once, click the X.



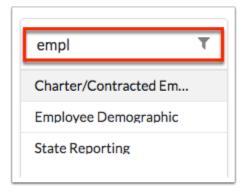
Charter/Contracted Employee Information

1. Once the employee has been selected, click on the **Charter/Contracted Emp Info** tab on the left side of screen to open the tab.

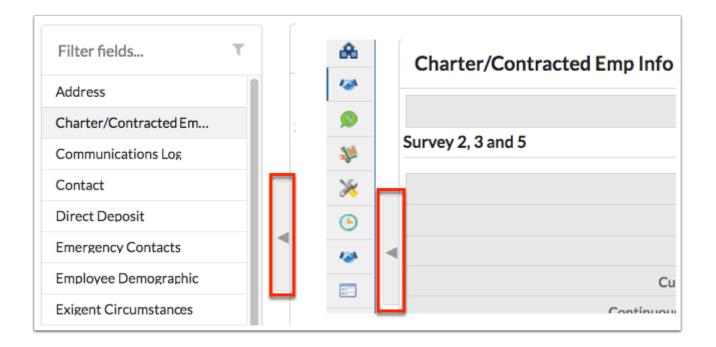


 Ω

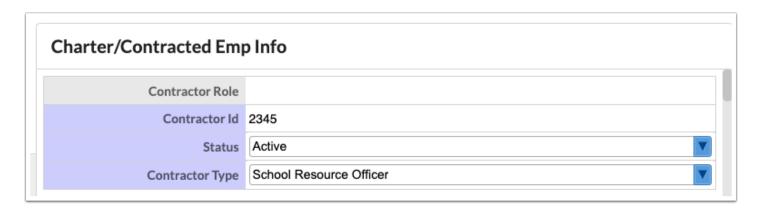
For a quick search, use the **Filter fields...** text box to begin typing the name of the tab.



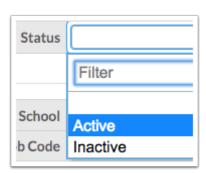
Click the **Expand/Shrink** gray arrow to hide the tabs on the left side of the screen to expand the selected tab. Once closed, click the gray arrow again to reopen the selection of tabs.



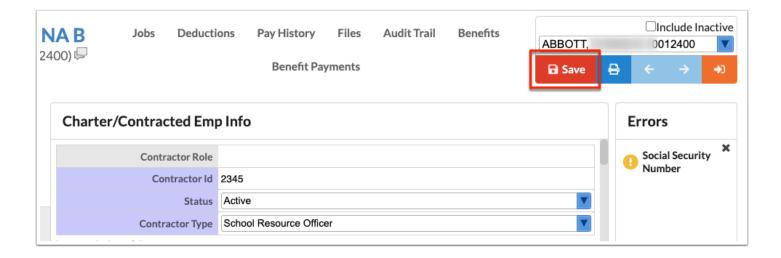
2. Enter the **Contractor Role** in the provided text box.



- **3.** Enter the **Contractor Id** in the provided text box.
- **4.** Select the user's **Status** as an Active or Inactive employee.

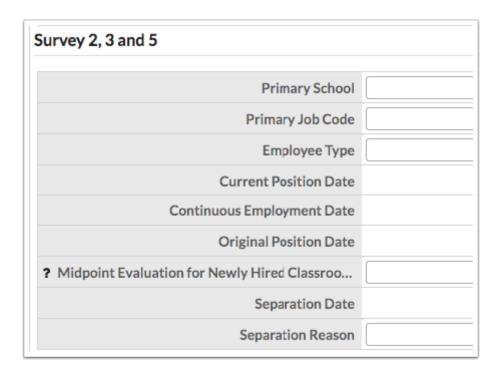


- **5.** Select the **Contracter Type** from the pull-down.
- 6. Click Save.



Survey 2, 3 and 5

The next nine fields are general information applicable to the employee that will pull into Surveys 2, 3, and 5 of state reporting.



- **1.** Select the employee's **Primary School** of working, and **Primary Job Code**.
- **2.** Select the **Employee Type** such as Contracted full-time employee, Student employee, etc.
- **3.** Select the **Current Position Date**, as in when the employee began their current position (the first day of their contract for their current position).
- **4.** Select the **Continuous Employment Date** from the Calendar. This is used when an employee continues employment within the same district but within a different position.

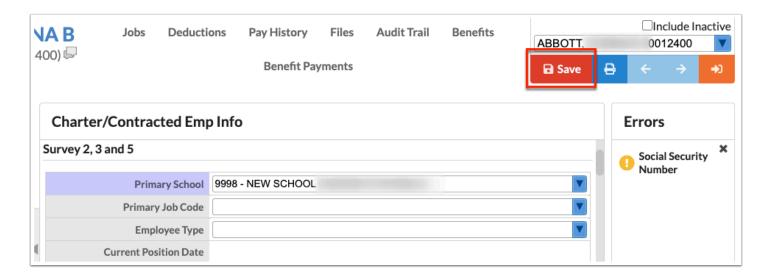
- **5.** The **Original Position Date** is also required here; this is the date the employee was originally hired; i.e. the first time they ever worked in the district.
- **6. Midpoint Evaluation for Newly Hired Classroom Teachers**: For Survey 3 only report midyear Personnel Evaluations for classroom teachers newly hired by the district, as defined by DOE.



Hover over the question marks (?) for information about the field. See the image for an example.



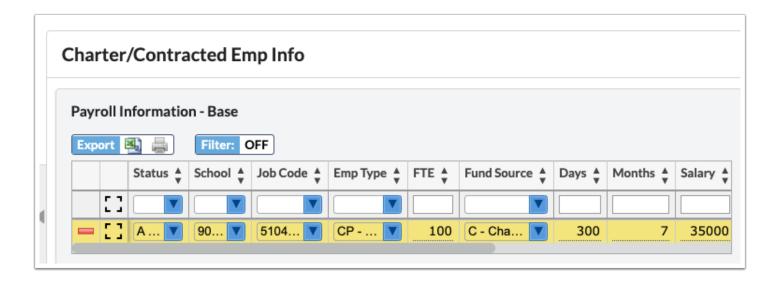
- **7.** If the user is no longer employed with your district, here you would indicate the **Separation Date** (last date of employment) and the **Separation Reason** (why this user is no longer employed at your district).
- 8. Click Save.



The next portion applies to Surveys 2 and 3 and is based on payroll information, compensations, benefits, etc.

Survey 2 & 3: Payroll Information - Base

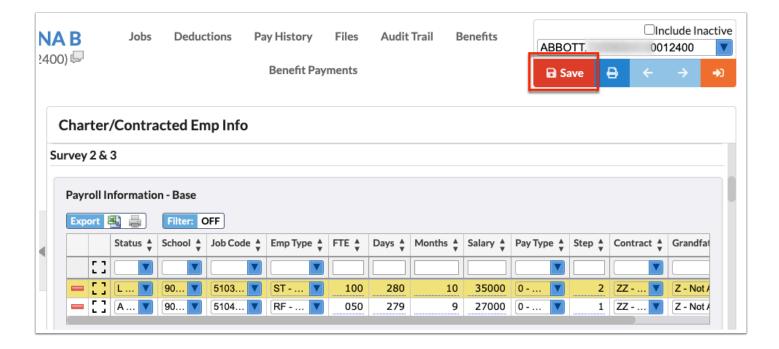
Payroll Information - Base must be completed in order to pull payroll data.



- **1.** Select the employee's **Status** from the pull-down such as Active, Leave of absence without pay, etc.
- **2.** Select the **School** that is to be tied to the employee and payroll.
- **3.** Select their **Job Code** such as Teacher, Coach, etc.
- **4.** Choose the **Emp Type** (Employment Type) from the pull-down such as Regular full-time employee, Temporary part-time employee, etc.
- **5.** Type in the corresponding **FTE**, the full-time equivalency of the job assignment (to the nearest whole percent). For one full-time equivalency, the employee's services are required each working day at least the number of hours equal to the number of hours of a regular working day for that job, as defined by DOE.
- **6.** Select the **Fund Source** from the pull-down.
- **7.** Enter the number of **Days** and/or **Months** worked.
- **8.** Type in the employee's **Salary** and select their **Pay Type** from the pull-down, such as Not an instructional employee and/or is not paid on the regular instructional personnel salary schedule, etc.
- **9.** Enter the **Step** for the employee.
- **10.** Choose the employee's **Contract** from the pull-down, such as Employee is a non-instructional staff member..., etc.
- **11.** Here you can also select a **Grandfather Indicator**: Grandfathered Salary Schedule Pay Type Indicator denotes whether the instructional staff member or school administrator, that was hired prior to 07/01/2011, was appointed for the first time beginning 07/01/2014 to a position in the capacity of instructional personnel or school administrator and was placed on the performance salary schedule, as defined by DOE.
- **12.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been

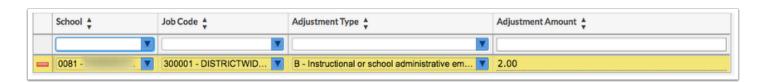
saved. Note: This is a logging field meaning you have the ability to register multiple lines of data. Once the Save button is clicked, the line will turn blue.

13. Click Save.

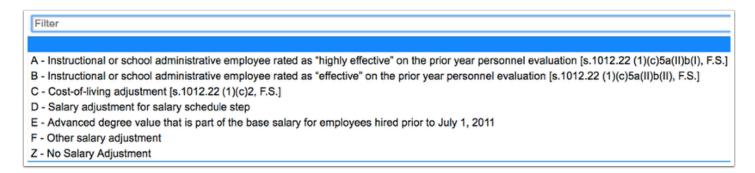


Survey 2 & 3: Payroll Information - Salary Adjustment

Payroll Information - Salary Adjustment must be completed in order to pull payroll and salary adjustment data.

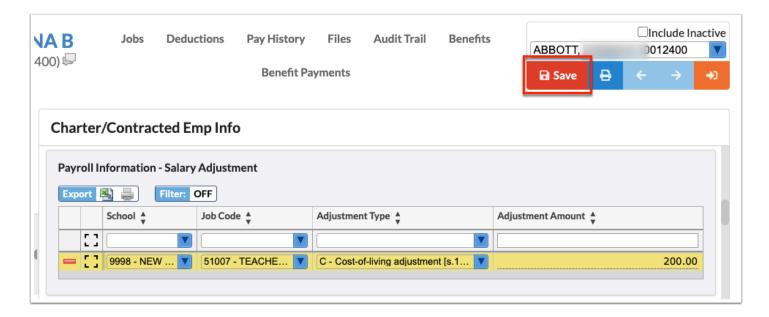


- **1.** Select the correct **School** of employment from the pull-down.
- 2. Select the employee's **Job Code** from the pull-down, such as Coach, Manager, Teacher, etc.
- **3.** Choose the correct **Adjustment Type** from the pull-down, such as Advanced degree value that is part of the base salary for employees hired prior to July 1, 2011, etc.



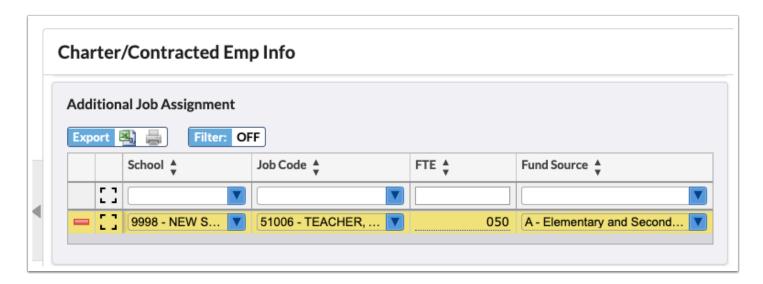
- **4.** The last step in recording adjustments is to type in the **Adjustment Amount**.
- **5.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.

6. Click Save.



Survey 2 & 3: Additional Job Adjustment

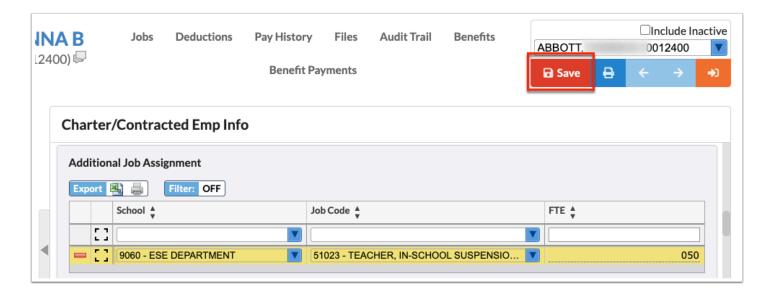
If the employee maintains an Additional Job Assignment, be sure to log that information in the corresponding section.



- **1.** Select the correct **School** of employment from the pull-down.
- **2.** Select the employee's **Job Code** from the pull-down, such as Coach, Manager, Teacher, etc.

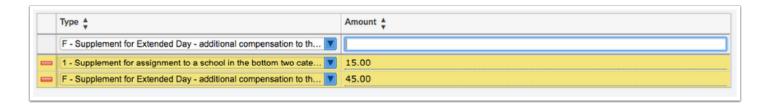
- **3.** Type in the employee's **FTE** for the corresponding Job Code.
- **4.** Select the **Fund Source** from the pull-down.
- **5.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.

6. Click Save.

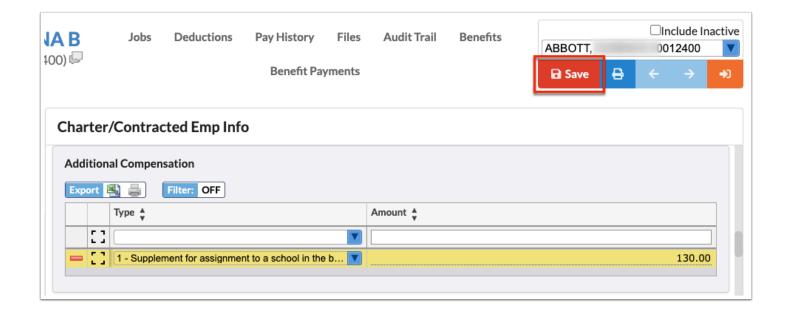


Survey 2 & 3: Additional Compensation

If the employee is receiving Additional Compensation, that information should be recorded here in order to pull into survey data.

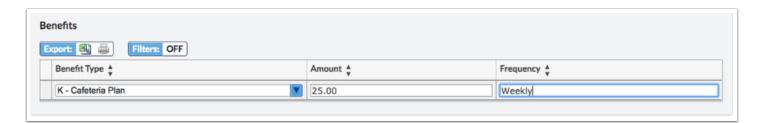


- **1.** First select the **Type** of compensation from the pull-down. An example would be Bonus for instruction in a course that lead to a CAPE Industry Certification.
- **2.** Then, input the **Amount** that was received for the type of compensation granted.
- **3.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.
- 4. Click Save.

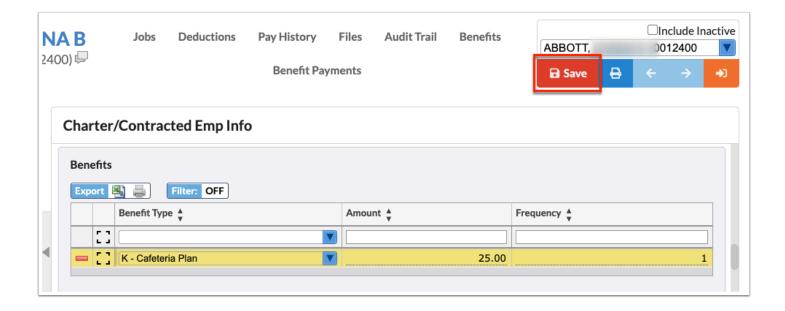


Survey 2 & 3: Benefits

If the employee is receiving Benefits, that information should be recorded here in order to pull into survey data.

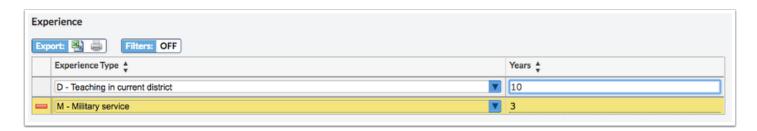


- **1.** Start entering Benefits by selecting the **Benefit Type** from the pull-down, such as Life Insurance, Worker's Compensation, etc.
- **2.** Enter the **Amount** the employee is receiving for each Benefit Type.
- **3.** Enter the **Frequency** of which each benefit is being received. See the image shown for an example.
- **4.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.
- 5. Click Save.

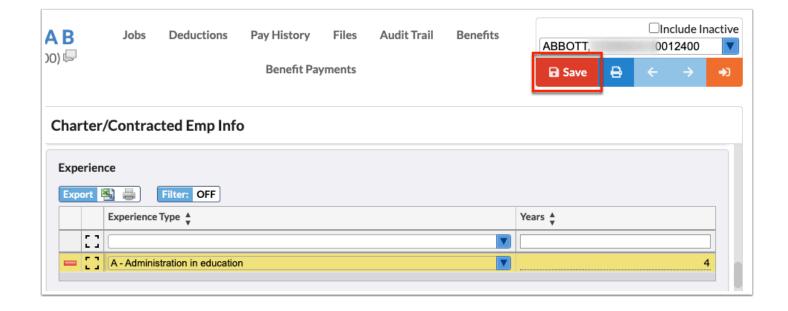


Survey 2 & 3: Experience

Record the employee's past Experience in the following section.



- **1.** Select the **Experience Type** from the provided pull-down, such as Military service, Teaching in current district, etc.
- **2.** Enter the number of **Years** the employee has invested in each Experience Type. For example, if the employee has been working in the district for 10 years, select Teaching in current district and type in 10 for Years (as shown in the image).
- **3.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.
- 4. Click Save.

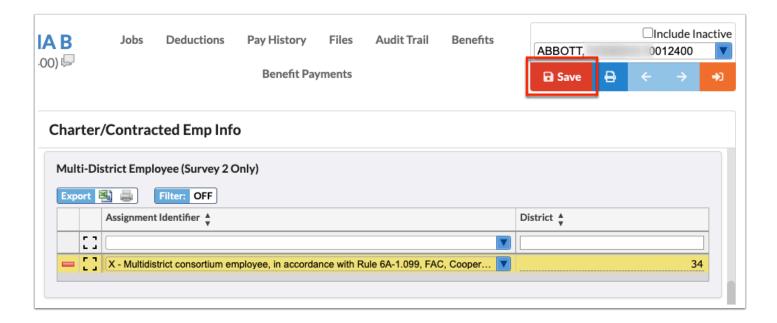


Multi-District Employee (Survey 2 Only)

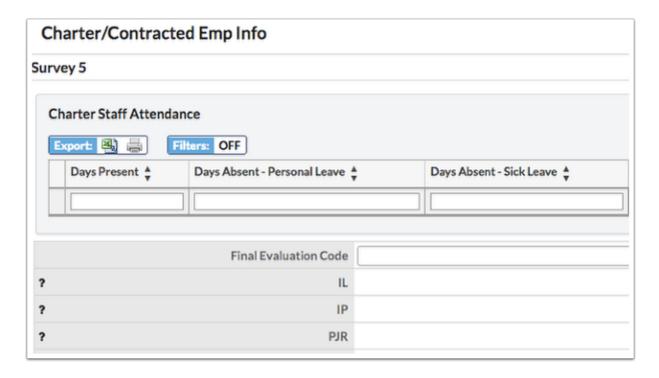
If you have an employee that is working in your district as well as another, record this information the Multi-District Employee section. Note: This information only pulls into Survey 2.



- **1.** First select the **Assignment Identifier** from the pull-down, such as Multidistrict consortium employee..., etc.
- **2.** Once the identifier has been selected, type in the name of the other **District** at which the user is employed.
- **3.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.
- 4. Click Save.



The next portion applies to **Survey 5** and is based on payroll information, compensations, benefits, etc.

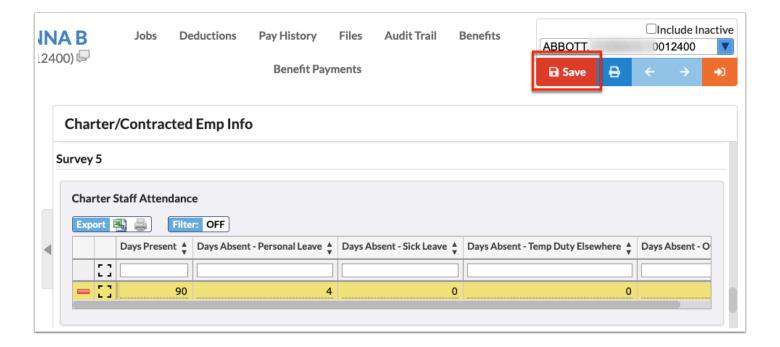


Survey 5: Charter Staff Attendance

Use the **Charter Staff Attendance** section to report and record sick days, etc. for charter school employees.



- **1.** Enter the **Days Present** for the employee: Number of days in the 180 day school year that the teacher or administrator was present in the job. The school year comprises the student contact days for that school. Report for regular full time and temporary full time staff only, as defined by DOE.
- 2. Enter Days Absent Personal Leave and Days Absent Sick Leave.
- **3.** If applicable, enter **Days Absent Temp Duty Elsewhere** for days the employee was absent from employment for conferences, professional meetings, study courses, workshops, school academic or athletic events, etc.
- **4.** Use the **Days Absent Other** field for any other absences that do not apply to the listed fields, some examples include annual leave, vacation leave, professional leave, suspension with or without pay, illness-in-line-of-duty leave, sabbatical leave, military leave, absence without leave, etc., as defined by DOE.
- 5. Click Save.

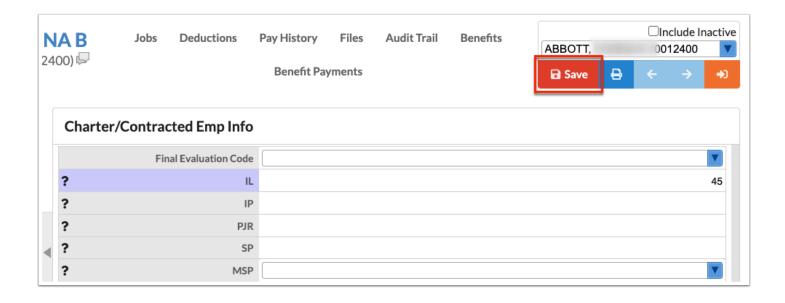


Survey 5

The Evaluation section records codes to track the levels of performance by indicating a Final Evaluation Code, a code for the Instructional Leadership Component, and more.



- **1. Final Evaluation Code** (a code to indicate the level of performance on the evaluation of the instructional staff member or school administrator status, as defined by DOE). An example here would be C: The instructional staff member or school administrator was determined to be highly effective on his or her evaluation.
- **2. IL** (Instructional Leadership Component): A two-digit code (two decimal places are assumed) indicating the percent of a school administrator's evaluation that is based on instructional leadership, that must be greater than or equal to 33 or less than or equal to 67, as defined by DOE.
- **3. IP** (Instructional Practice Component): A two-digit code (two decimal places are assumed) indicating the percent of an instructional staff member's evaluation that is based on instructional practice that must be greater than or equal to 33 or less than or equal to 67, as defined by DOE.
- **4. PJR** (Professional and Job Responsibilities Component): A two-digit code (two decimal places are assumed) indicating the percent of an instructional staff member or school administrator's evaluation that is based on professional and job responsibilities that must be less than or equal to 33, as defined by DOE.
- **5. SP** (Student Performance Component): A two-digit code (two decimal places are assumed) indicating the percent of an instructional staff member or school administrator's evaluation that is based on performance of students that must be greater than or equal to 33 or less than or equal to 67, as defined by DOE.
- **6. MSP** (Measures of Student Performance): A code to indicate the measures of student performance is based in the personnel evaluation of a classroom teacher or school administrator, as defined by DOE. An example would be code B: Exclusively (100%) on district-developed or district-selected end-of-course assessments.
- 7. Click Save.



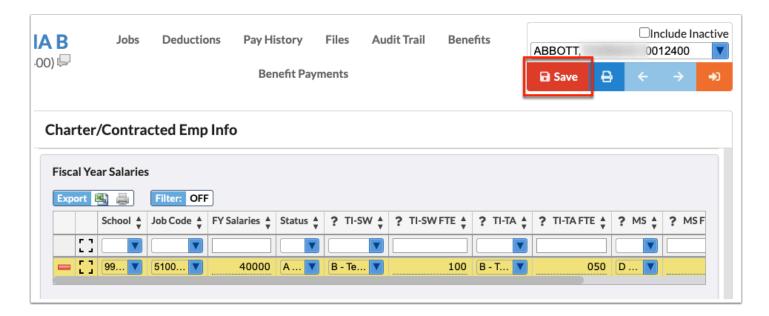
Survey 5: Fiscal Year Salaries

The next section you will record **Fiscal Year Salaries** for the employee.



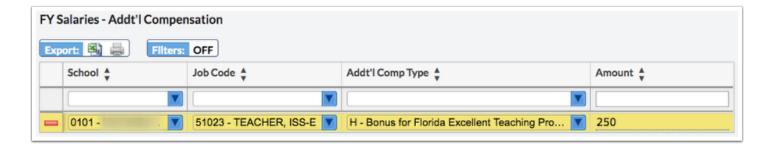
- **1.** Select the correct **School** of employment from the pull-down.
- **2.** Select the employee's **Job Code** from the pull-down, such as Coach, Manager, Teacher, etc.
- **3.** Type in the **FY Salaries**: all salaries paid to the staff member for the job being reported, as defined by DOE.
- **4.** Select the employee's **Status** from the pull-down such as Active, Leave of absence without pay, etc.
- **5.** Select the correct **TI-SW** (Title I School Wide) option from the pull-down, such as Teacher, Support staff, etc.
- **6.** Type in the amount of FTE to be received for Title I School Wide employee (**TI-SW-FTE**) for employees who worked with a Title I School-wide program and who was paid from Title I, Part A funds and the corresponding full-time equivalency (FTE) of this assignment.
- **7.** Select the type of Title I Targeted Assistance (**TI-TA**) that applies to the employee, i.e. a code to identify the job category of the employee who worked with a Title I Targeted Assistance program and who was paid from Title I, Part A funds and the corresponding full-time equivalency (FTE) of this assignment, as defined by DOE.

- **8.** Type in the consequent FTE for Title I Targeted Assistance (**TI-TA-FTE**).
- **9.** If the employee is a migrant worker during the summer months, select the appropriate type of Migrant Summer (**MS**) status, such as Counselors, Recruiters, etc.
- **10.** Type in the applicable FTE for the Summer Migrant worker (**MS FTE**).
- **11.** If the employee is a Migrant Worker during the Regular School Year, select the type of employment from the **MR** pull-down.
- **12.** Type in the MR FTE (Migrant Regular School Year FTE) to be received, such as 050.
- **13.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.
- 14. Click Save.



Survey 5: FY Salaries - Addt'l Compensation

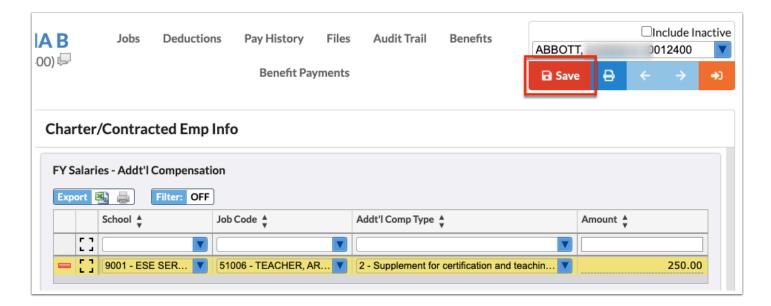
Navigate to the **FY Salaries Addt'l Compensation** section to record adult compensation for fiscal year salary workers.



1. Select the correct **School** of employment from the pull-down.

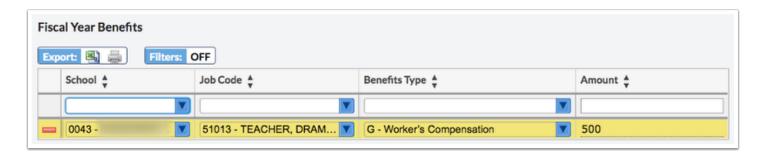
- 2. Select the employee's **Job Code** from the pull-down, such as Coach, Manager, Teacher, etc.
- **3.** Select the **Addt'l Comp Type** from the pull-down, such as a Bonus, Sabbatical Leave Pay, etc.
- **4.** Lastly, enter the **Amount** received as an additional compensation.
- **5.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.

6. Click Save.



Survey 5: Fiscal Year Benefits

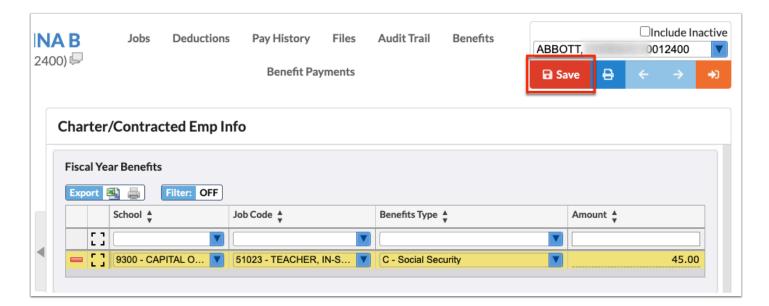
Fiscal Year Benefits is the last section to be completed; be sure to record any benefits the employee is receiving or has received in the past fiscal year.



- **1.** Select the correct **School** of employment from the pull-down.
- **2.** Select the employee's **Job Code** from the pull-down, such as Coach, Manager, Teacher, etc.
- **3.** Select the **Benefits Type** from the pull-down; for example, Florida Retirement System, Life Insurance, etc.

- **4.** Input the **Amount** the employee is receiving for each benefit.
- **5.** When all information has been entered and/or selected, be sure one of the fields is selected and press **Enter** to save the line of data. The line will turn yellow indicating that it has been committed. Once the Save button is clicked, the line will turn blue. Note: This is a logging field meaning you have the ability to register multiple lines of data.

6. Click Save.

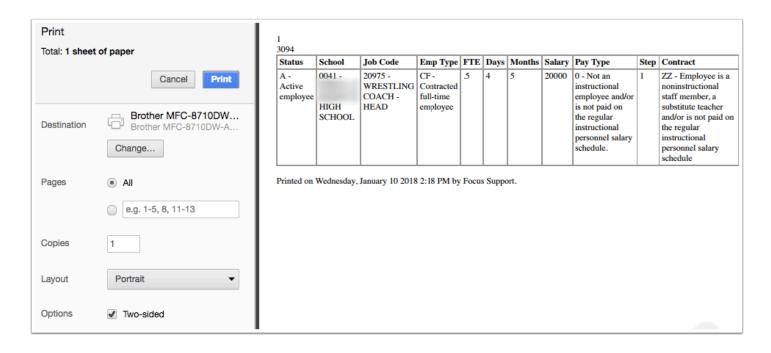


Additional Features

Click the **Excel** icon in the Export section allows you to export the report to an Excel spreadsheet.



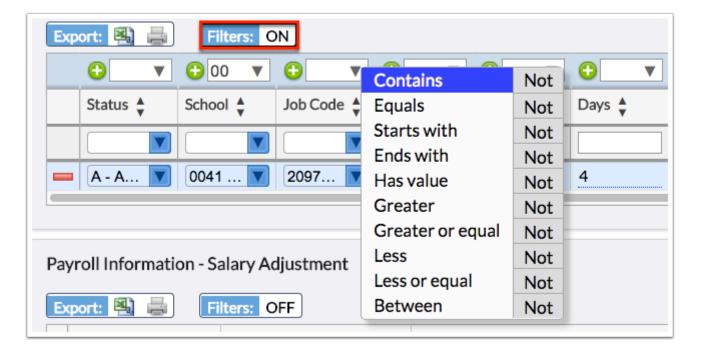
Click the **Print** icon in the Export section as shown in the image above. Depending on browser settings, this will generate a print preview where you will have the ability to change the layout, print two-sided, etc.



Click Filters to breakdown data.



- a. To add more than one filter to a column, click the green plus sign.
- **b.** To delete an additional filter, click the **red minus sign**.
- **c.** For additional filtering options, click the **gray arrow** for a filter pull-down.



You can also sort data by clicking on any of the headers that contain the black double arrows. Click once for ascending results; click twice for descending results.



If a line has been committed with incorrect information, click the delete button (red minus sign) to remove the information.

