PERSONNEL ACTIONS QUICK START GUIDE FOR CHARTER SCHOOLS

7/20/17

New Hire Personnel Actions Entry:

If the new employee is a current or former Pasco County Schools employee, you will need to contact your HR representative with Pasco County Schools. They will change the Location on the Employee Master and let you know which procedures you should follow to do the personnel action entry.

1. Open:

   Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry

2. Click: "Add".
3. Click: "+" to auto-assign next available Employee Number.
4. Tab to "Posting Date". Enter the date the person starts working or Click: on the Calendar and select the appropriate date.

   Note: If other actions are pending, then the warning "There are already actions pending for this employee" will appear. Check to make sure this action has not already been done or will not conflict with other actions.

5. Tab to "Action Code" – In the drop down box, select the Action Code "**N100-New Hire**".
6. Tab to "Reason/Auth Code" – In the drop down box, select the Reason/Auth Code "**N070-New Hire Charter School**".

   Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click "Accept", you will not be able to go back in and correct it. You will have to delete the personnel action, do a new one and scan all documents again.

7. Tab to "Comment Field" – Enter any comment that will help identify what this action is for, i.e., "New Hire Elementary Teacher at AATF effective 7/20/17". Be sure to include the job title, location and effective date or start date of this action.
8. Click: "Accept". The Condensed Pending Master screen will appear.

Condensed Pending Master:

9. SSN field will be highlighted; type in the SSN. Tab: to name fields and enter the individual's name as it appears on the SSN card. Note: If the block "Duplicate SSN" appears, click: "Yes". If this is the same person you are entering, then this person is either a current employee of the district or has been an employee of the District before and is a rehire. Cancel the action by clicking: "Cancel". The window will appear asking "Are you sure you want to cancel this action? Any changes will not be saved." Click: "Yes, cancel" and click: "Return". You will need to contact HR to have the location changed on the individual's records so you will be able to enter the personnel actions. They will also tell you what process to use (Doing Personnel Actions Entry For Rehire-Terminated Database, Doing Personnel Actions Entry for Rehire-Active Database or Doing Personnel Actions for Hiring Current Employee). If this person is not the same individual, then there are duplicate SSNs in the system and this will need to be resolved with the district Human Resources office.

10. Tab to "Primary Job Class" and Click: on the ellipse. Charter school job classes will be in the 9400 range. To put job classes in numerical order, click: "Job Code"; to put in alphabetical order, click: "Description". Click: on the appropriate job class and Click: "Accept". If the job class does not exist, please contact your HR representative at the district so the job class can be added. Note: If the individual will have more than one job, the job class entered here will be for the primary job.

11. Tab to "Primary Location" and Click: on the ellipse. Click: on your location and Click: "Accept". Note: This location is the location of the primary job.

12. Tab to "Account" and enter 1300PAYR66CHART53900051000000. It is not necessary to have spaces between numbers when entering the account coding.

13. Tab to "Personnel Status" and Click: on the drop down. Click: on 15-FULL TIME NON BENEFIT ELIGIBLE. For board members and contracted employees, click: on 55-TEMPORARY PART TIME.

14. Tab to "Check Location" and enter your cost center number.

15. Tab two times. You will now be on the "Address" tab. Enter the individual's address. Do not complete the "Country" field unless the address is outside the United States. You do not have to enter the "County". In the "Home Phone" field, enter the phone number (i.e., 813-794-2000). In the "Email" field, enter the employee's charter school email address. You do not have to enter anything in the "Supervisor" field.

16. Tab and you will now be on the "Demographics" tab. Click: "Gender" and Click: on appropriate selection.

17. Tab to "Ethnic code" and Click: on the drop down. Click: on the appropriate code.

18. Tab to "DOE Ethnicity" and Click: on the appropriate selection.

19. Tab to "DOE Race" and Click: on the appropriate selection(s).

20. Tab to the “Dates” tab. In the “Birth Date” field, type in the birth date.

21. Tab to “Hire Date” and enter date the employee started or Click: on Calendar and select the appropriate date.

22. Tab to “Service Date”. This should be the same date as the Hire Date.

23. Tab to “Permanent Date”. This field is used for the “Instructional Seniority Date” on the Employee Master and a date is entered only if the new hire is a teacher. The date should be the same date as the Hire Date.

24. Click: “Accept” and Click: “Return”. You should be back on the Personnel Action Entry screen.

25. In the upper right part of the ribbon, Click: “Detail”.

26. On the “Detail” screen, Click: “Employee Master Main” and Click: “Accept”.

Pending Employee Master:

27. On the “Pending Employee Master” screen, Click: “Update” and then the “Dates” tab.

28. Click: “Orig Hire” and enter the date. Should be the same as the Hire Date.

29. If the new hire is not a teacher, Click: “Instructional Seniority Date” and remove the date.

30. Click: “Demographics” tab and then Click: “Highest Degree”. Make selection from the drop down menu. Click: “Accept”

31. To add more addresses (to include mailing address), phone numbers and emergency contacts, Click: “Address” tab. Go to the bottom of the screen and click on the appropriate label. Once on the screen, Click: “Add” and enter the needed information and Click: “Accept” then “Return”. Repeat for additional information that needs to be added. You should be back on the “Pending Employee Master” screen.

Attaching Documents:

32. Prepare the I-9 and supporting documents (driver’s license, social security card, passport, etc.) for scanning.

33. Click: “Attach” (paperclip) in the ribbon. The Document Mapping window opens.

34. In “Associated Documents”, scroll down to “Employee I-9” and click on it. Click: “View Documents”, then click: “New”. Place the I-9 documents into your scanner.

35. If you are on a PC, Click: “Scan” in the ribbon, select your scanner, then Click: “Scan”. Documents will appear in the middle of your screen. Click: “Save” in the ribbon. If you are on a MAC, you will need to scan the I-9 documents to your desktop. Click: “New” and then “Import” in the ribbon. Click: “Choose File”, select the scanned documents from your desktop and Click: “Open” and then “Import”. You can also drag the selected documents to “Drop Files Here” and then Click: “Import”. Click: “Save” in the ribbon.
36. Click: “Save” in the ribbon, then click: “Close”. You should be back on the Pending Employee Master screen.
37. Click: “Return”.

User Defined Fields:

38. On the “Detail” screen, Click: “User Defined Fields” and Click: “Accept”.
39. Click: “Add” and Tab: to “Field ID Code”. Click: “Fingerprint Original Date”. Tab: to “Date” and enter date individual was fingerprinted. Tab: to “Value” and enter “Approved”. Click: “Accept”.
40. Click: “Return”.

Pending Employee Pay:

Note: Board members and contracted employees do not require job salary records.

41. On the “Detail” screen, Click: “Employee Pay” and Click: “Accept”.
42. Click: “Add”. Note: If you get: “Warning: If all current pending actions are posted, FTE will exceed the maximum for this position” anytime while on this screen, just Click: “OK”.
43. Tab to “Work Start/End”. Enter the date the individual started working.
44. Tab to “Position” and Click: on the ellipse. Click: on the appropriate position and Click: “Accept” and Tab. Information on the Job/Salary record will auto fill. If the position does not exist for your school, please contact your HR representative at the district so the position can be added. Verify “Status” is “15-FULL TIME NON BENEFIT ELIGIBLE” and that the Start Date and the Effective Date are the same as the “Hire Date” on the Employee Master. If not make the necessary corrections.
45. Tab to “Days/Year”. Enter the number of contracted days the employee would normally work in a year.
46. Tab to “Sched Hours”. Enter the number of hours contracted to work per pay period.

47. Tab to “Annual Pay”. Enter the annual salary the employee would receive if they worked the complete year (hourly rate x number of hours per day x number of days per year).

48. Tab to “Hours/Day”. Enter the number of hours contracted to work per day.

49. Tab to “Hours/Year”. Enter the number of hours contracted to work per year.

50. Click: “Accept”. If you get the “Use Mid-Year” window, click: “Cancel”.

51. You may be directed to the “FIT and SIT Settings” (W-4) screen. If so, just click: “Accept.

52. Click: “Return”.

Employee Deductions:

Note: Board members and contracted employees do not require deductions to be entered.

Note: Deductions may need to be added later in the year once the amounts are known.

53. On the “Detail” screen, click: “Employee Deductions” and click: “Accept”. The deduction codes for Charter FICA-1001, Charter Medicare 1101, Charter Worker’s Compensation 9000 and Charter Unemployment 9003 will default in.

54. To add amounts to one of the deductions, click: on the appropriate deduction and then click: “Accept”.

55. Click: Update”. Tab to “Start Date”, enter the date the deduction starts.

56. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

57. Click: “Accept”.

58. To add amounts to other deductions, click: on left or right arrows at the bottom of screen to find appropriate deduction. Repeat the above steps 55-57.

59. To add a new deduction, click: “Add”.

60. Tab to “Deduction” and click: on the ellipse and click: on the appropriate code for the deduction you are entering. Click: “Accept”. Note: codes can be arranged alphabetically by clicking on the Deduction tab.

61. Tab to “Start Date” and enter the date this deduction starts.

62. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

63. Click: “Accept”.

64. Repeat the above steps 59-63 to add other deductions.

65. Click: “Return”.

Employee Certifications:

Certifications will enter this data. You will only be able to view the data.

Employee Education:

Note: Board members and contracted employees do not require education to be completed.

66. On the “Detail” screen, Click: “Employee Education” and Click: “Accept” (may take a while to load).

67. Click: “Add”.

68. Click: “Institution Code” and Click: on the appropriate institute. Note: codes are arranged alphabetically by state.

69. Click: “Degree Code” and Click: on the appropriate selection.

70. Click: “Area Code 1” and Click: on the appropriate area.

71. Tab to “State” and enter two digit state code.

72. Tab to “Graduation Date” and enter the date graduated.

73. Tab to “Date Entered” and enter date this record is being entered.

74. Tab to “Verified” and Click: on the box.

75. Click: “Accept”.

76. If the individual has other degrees, then repeat steps 67 - 75.

77. Click: “Return”.

Employee Years of Service:

Note: Board members and contracted employees do not require years of service to be completed.

78. On the “Detail” screen, Click: “Employee Years of Service” and Click: “Accept”.

79. Click: “Add”.

80. Click: “Job Category” and Click: on the appropriate categories needed for this individual:

    a. For instructional administrators, select Job Category 1000; for noninstructional administrators, select Job Category 1030. Tab: to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab: to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    b. For teachers, select Job Category 2000. Tab: to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab: to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    c. For all other employees, select Job Category 5000. Tab: to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab: to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

81. Click: “Accept” and then Click: “Return”.

Employee I-9 Tracking:

82. On the “Detail” screen, Click: “Employee I-9 Tracking” and Click: “Accept”.

83. Click: “Add”.

84. Click: “Citizenship Status” and Click: on appropriate status from Section 1 of the I-9.

85. If the employee is an “Authorized Alien” or “Lawful Permanent Resident”, Tab: to “Alien/Admission Number” and enter the ID number from the Authorized Alien or Permanent Resident document.

86. Complete the “Document Type” only if the employee is not a US Citizen. Note: You will need to expand the columns to read the header labels. In “Document Type”, select the document type that is listed in Section 2 of the I-9 (List A; List B; List C). Then in “Document Title”, select the document that is listed on the I-9. Select the appropriate issuing authority; then enter the document number and expiration date (if any) from the I-9. Repeat the above if another document is listed on the I-9.

87. Click: “Accept” and then click: “Return”.

Return to Personnel Actions Entry:

88. On the “Detail” screen, Click: “Return” to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: “Release”. If “Release” does not appear in the ribbon, click: “More” and click: “Release”. Answer “Yes” when box appears “Release this action for approval.”

89. Now go back to the upper right of the ribbon. Click: “Output Post”. Select “Display” and Click: “OK”. The personnel action proof will appear. Close the proof window and a “Post Actions” box will appear. Click: “Yes” to post the current action set to “Live” data.

Rehire-Terminated Database Personnel Actions Entry:

If the new employee is a former Pasco County Schools employee, you will need to contact your HR representative with Pasco County Schools. They will change the Location on the Employee Master and let you know which procedures you should follow to do the personnel action entry.

Important: The terminated employee may have several employee records (terminated record, retired with benefits record, early retirement record, etc.). Do not use the employee ID that is associated with job class 8997, 8998 or 8999.

Note: If the person left prior to the conversion to MUNIS, many of the fields will not be populated. For example, the Employee Master may not have any User Defined Fields set up, there may not be any data in the Years of Service, Certifications or Education. You will need to add that data. If data is present, verify it is correct and make any needed corrections.

1. Open:

   Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry

2. Click: "Add".

3. In "Employee" block, type in the employee's former employee MUNIS ID number. When you tab, the SSN and name will auto fill.

4. Tab to "Posting Date" Enter the date the person starts working.

   Note: If other actions are pending, then the warning "There are already actions pending for this employee" will appear. Check to make sure this action has not already been done or will not conflict with other actions.

5. Tab to "Action Code" – In the drop down box, select the Action Code "**R100-Rehire**".

6. Tab to "Reason/Auth Code" – "Terminated Employee" box will appear asking if you would like to activate this employee. Click: "Yes". In the drop down box, select the Reason/Auth Code "**R070-Rehire Charter School**". Note: If the warning "This is already an active employee", appears, this person is in the active database. Cancel the action by clicking on "Cancel". The window will appear asking "Are you sure you want to cancel this action? Any changes will not be saved." Click: "Yes, cancel" and click: "Return". Go to the section below that covers "Rehire-Active Database Personnel Actions Entry".

   Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click "Accept", you will not be able to go back in and correct it. You will have to delete this personnel action, do a new one and scan all documents again.

7. Tab to “Comment Field” – Enter any comment that will help identify what this action is for, i.e., “Rehire Data Entry Operator at CMA effective 7/20/17”. Be sure to include the job title, location and effective date or start date of this action.

8. Click: “Accept”. The Condensed Pending Master screen will appear.

Condensed Pending Master:

9. SSN field will be highlighted. Tab: to name fields and enter the individual’s name as it appears on the SSN card. Note: If the block “Duplicate SSN” appears, click: “Yes”. Verify that this is the same person you are entering. If this is the same person, click: “Accept”. If this person is not the same individual, then there are duplicate SSNs in the system and this will need to be resolved with the district Human Resources office. Click: “Return” and “Return” again. You should be back on the Personnel Action Entry. Click: “Delete” to delete the personnel action.

10. Tab to “Primary Job Class” and Click: on the ellipse. Charter school job classes will be in the 9400 range. To put job classes in numerical order, click on “Job Code”; to put in alphabetical order, click on “Description”. Click on the appropriate job class and Click: “Accept”. If the job class does not exist, please contact your HR representative at the district so the job class can be added. Note: If the individual will have more than one job, the job class entered here will be for the primary job.

11. Tab to “Primary Location” and click on the ellipse. Click on your location and Click: “Accept”. Note: This location is the location of the primary job.

12. Tab to “Group/BU” and type 9000 in the box.

13. Tab to “Account” and enter 1300PAYR66CHART53900051000000. It is not necessary to have spaces between numbers when entering the account coding.

14. Tab to “Personnel Status” and click on the drop down. Click: 15-FULL TIME NON BENEFIT ELIGIBLE. For board members and contracted employees, click: on 55-TEMPORARY PART TIME.

15. Tab to “Check Location” and click on the ellipse. Click on your location, then click: “Accept”.

16. Tab two times. Note: If the State ID field highlights with an error code, delete the number that appears in that field and then tab.

17. You will now be on the “Address” tab. Enter the individual’s address. Do not complete the “Country” field unless the address is outside the United States. You do not have to enter the “County”. In the “Home Phone” field, enter the phone number (i.e., 813-794-2000). In the “Email” field, enter the employee’s charter school email address. You do not have to enter anything in the “Supervisor” field.

18. Tab and you will now be on the “Demographics” tab. Click: “Gender” and click on the appropriate selection.
19. Tab to “Ethnic Code” and click on the drop down. Click on the appropriate code. Note: If you get “Invalid Marital Code” error, click on the drop down in the “Actual Marital Status” field and select the blank space below “Legally Separated”. Then Tab to “Ethnic Code”.
20. Tab to “DOE Ethnicity” and click on the appropriate selection.
21. Tab to “DOE Race” and click on the appropriate selection(s).
22. Tab to the “Dates” tab. In the “Birth Date” field, type in the birth date.
23. Tab to “Hire Date” and enter date the employee was rehired or click on Calendar and select the appropriate date.
24. Tab to “Service Date”. This should be the same date as the Hire Date.
25. Tab to “Permanent Date”. This field is used for the “Instructional Seniority Date” on the Employee Master and a date is entered only if the new hire is a teacher. The date should be the same date as the Hire Date. If the employee is not a teacher, delete any date that appears in this field.
26. Click “Accept” and click: “Return”. You should be back on the Personnel Action Entry screen.
27. In the upper right part of the ribbon, Click: “Detail”.
28. On the “Detail” screen, click: “Employee Master Main” and click: “Accept”.

Pending Employee Master:

29. On the “Pending Employee Master” screen, Click: “Update”, tab to “Status” and change to “Active”.
30. Click: “Dates” tab. Remove the dates and codes that appear in the “Inactive” and “Terminated” fields. To remove the codes, click on the drop down boxes and scroll to the bottom. Click on the blank space after “Unknown”.
31. Do not change the date in the “Orig Hire” field.
32. Click on the “Demographics” tab and then click: “Highest Degree”. Make selection from the drop down menu. Click: “Accept”.
33. To add more addresses (to include mail address), phone numbers and emergency contacts, click on the “Address” tab. Go to the bottom of the screen and click on the appropriate label. Once on the screen, Click: “Add” and enter the needed information and click: “Accept” then “Return”. Repeat for additional information that needs to be added.

34. If the employee's name has changed, while on the "Address" tab, click "Update" and click: "Prior Name". Enter the previous name in the field and then Click: "Accept".

Attaching documents:

35. Prepare the I-9 and supporting documents (driver's license, social security card, passport, etc.) for scanning.

36. Click: "Attach" (paperclip) in the ribbon.

37. In "Document Mappings", scroll down to "Employee I-9". Click: "View Documents" and click: "New". Place the I-9 documents into your scanner.

38. If you are on a PC, Click: "Scan" in the ribbon, select your scanner, then Click: "Scan". Documents will appear in the middle of your screen. Click: "Save" in the ribbon. If you are on a MAC, you will need to scan the I-9 documents to your desktop. Then Click: "New" and then "Import" in the ribbon, select the scanned documents from your desktop and Click: "Open". Either the documents or "Launch in External Viewer" will appear in the middle of your screen. Click: "Save" in the ribbon.

39. In the ribbon, Click: "Close". You should be back on the Pending Employee Master screen.

40. Click: "Accept" and then "Return".

User Defined Fields:

41. On the "Detail" screen, Click: on "User Defined Fields" and Click: on "Accept". If data appears on this screen, click: on "Accept".

42. Click: "Add" and tab to "Field ID Code". Click: "Fingerprint Rehire Date". Tab to "Date" and enter date individual was fingerprinted. Tab to "Value" and enter "Approved". Click: "Accept".

43. Click: "Return".

Pending Employee Pay:

Note: Board members and contracted employees do not require job salary records.

44. On the "Detail" screen, Click: "Employee Pay" and Click: "Accept".

45. Click: "Add". Note: If you get: "Warning: If all current pending actions are posted, FTE will exceed the maximum for this position" anytime while on this screen, just Click: "OK".

46. Tab to "Work Start/End". Enter the date the individual started working.
47. Tab to "Position" and Click: on the ellipse. Click: on the appropriate position and Click: "Accept" and tab. Information on the Job/Salary record will auto fill. If the position does not exist for your school, please contact your HR representative at the district so the position can be added. Verify "Status" is the same as on the Employee Master. Also verify that the Start Date and the Effective Date are the same as the "Hire Date" on the Employee Master. If not make the necessary corrections.
48. Tab to "Days/Year". Enter the number of contracted days the employee would normally work in a year.
49. Tab to "Sched Hours". Enter the number of hours contracted to work per pay period.
50. Tab to "Annual Pay". Enter the annual salary the employee would receive if they worked the complete year (hourly rate x number of hours per day x number of days per year).
51. Tab to "Hours/Day". Enter the number of hours contracted to work per day.
52. Tab to "Hours/Year". Enter the number of hours contracted to work per year.
53. Click: "Accept". If you get the "Use Mid-Year" window, click: "Cancel".
54. You may be directed to the "FIT and SIT Settings" (W-4) screen. If so, just click: "Accept.
55. Click: "Return".

Employee Deductions:

Note: Board members and contracted employees do not require deductions to be entered.

Note: Deductions may need to be added later in the year once the amounts are known.

56. On the "Detail" screen, click: "Employee Deductions" and click: "Accept". The deduction codes for Charter FICA-1001, Charter Medicare 1101, Charter Worker's Compensation 9000 and Charter Unemployment 9003 will default in.
57. To add amounts to one of the deductions, click: on the appropriate deduction and then click: "Accept".
58. Click: Update". Tab to "Start Date", enter the date the deduction starts.
59. Tab to "Employer Ann Amt" (on right side of screen) and enter the annual amount paid by employer.
60. Click: "Accept".

61. To add amounts to other deductions, click: on left or right arrows at the bottom of screen to find appropriate deduction. Repeat the above steps 58-60.
62. To add a new deduction, click: “Add”.
63. Tab to “Deduction” and click: on the ellipse and click: on the appropriate code for the deduction you are entering. Click: “Accept”. Note: codes can be arranged alphabetically by clicking on the Deduction tab.
64. Tab to “Start Date” and enter the date this deduction starts.
65. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.
66. Click: “Accept”.
67. Repeat the above steps 62-66 to add other deductions.
68. Click: “Return”.

Employee Certifications:

Certifications will enter this data. You will only be able to view the data.

Employee Education:

Note: Board members and contracted employees do not require education to be completed.

69. On the “Detail” screen, Click: “Employee Education” and Click: “Accept” (may take a while to load).
70. Click: “Add”.
71. Click: “Institution Code” and Click: on the appropriate institute. Note: codes are arranged alphabetically by state.
72. Click: “Degree Code” and Click: on the appropriate selection.
73. Click: “Area Code 1” and Click: on the appropriate area.
74. Tab to “State” and enter two digit state code.
75. Tab to “Graduation Date” and enter the date graduated.
76. Tab to “Date Entered” and enter date this record is being entered.
77. Tab to “Verified” and Click: on the box.

78. Click: “Accept”.

79. If the individual has other degrees, then repeat steps 70 - 78.

80. Click: “Return”.

Employee Years of Service:

Note: Board members and contracted employees do not require years of service to be completed.

81. On the “Detail” screen, Click: “Employee Years of Service” and Click: “Accept”.

82. Click: “Add”.

83. Click: “Job Category” and Click: on the appropriate categories needed for this individual:

    a. For instructional administrators, select Job Category 1000; for noninstructional administrators, select Job Category 1030. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

    b. For teachers, select Job Category 2000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

    c. For all other employees, select Job Category 5000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

84. Click: “Accept” and then Click: “Return”.

Employee I-9 Tracking:

85. On the “Detail” screen, Click: “Employee I-9 Tracking” and Click: “Accept”.
86. Click: “Add”.
87. Click: “Citizenship Status” and Click: on appropriate status from Section 1 of the I-9.
88. If the employee is an “Authorized Alien” or “Lawful Permanent Resident”, Tab to “Alien/Admission Number” and enter the ID number from the Authorized Alien or Permanent Resident document.
89. Complete the “Document Type” only if the employee is not a US Citizen. Note: You will need to expand the columns to read the header labels. In “Document Type”, select the document type that is listed in Section 2 of the I-9 (List A; List B; List C). Then in “Document Title”, select the document that is listed on the I-9. Select the appropriate issuing authority; then enter the document number and expiration date (if any) from the I-9. Repeat the above if another document is listed on the I-9.
90. Click: “Accept” and then Click: “Return”.

Return to Personnel Actions Entry:

91. On the “Detail” screen, Click: “Return” to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: “Release”. If “Release” does not appear in the ribbon, click: “More” and then “Release”. Answer “Yes” when box appears “Release this action for approval.”
92. Now go back to the upper right of the ribbon. Click: “Output Post”. Select “Display” and Click: “OK”. The personnel action proof will appear. Close the proof window and a “Post Actions” box will appear. Click: “Yes” to post the current action set to “Live” data.

Rehire-Active Database Personnel Actions Entry:

If the new employee is a former Pasco County Schools employee, you will need to contact your HR representative with Pasco County Schools. They will change the Location on the Employee Master and let you know which procedures you should follow to do the personnel action entry.

Individuals can be terminated but still be in the active database. This is the database we use on a daily basis. Munis does not consider them to be new “hires” or “rehires” so you are unable to use any of the Action codes that begin with “N” or “R”. Important: The terminated employee may have several employee records (terminated record, retired with benefits record, early retirement record, etc.). Do not use the employee ID that is associated with job class 8997, 8998 or 8999.

1. Open: Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry
2. Click: “Add”.
3. In “Employee” block, type in the employee’s former employee MUNIS ID number. When you tab, the SSN and name will auto fill.
4. Tab to “Posting Date” Enter the date the person starts working.

   Note: If other actions are pending, then the warning “There are already actions pending for this employee” will appear. Check to make sure this action has not already been done or will not conflict with other actions.

5. Tab to “Action Code” – In the drop down box, select the Action Code “**S005-Rehire Active Database**”.
6. Tab to “Reason/Auth Code” – In the drop down box, select the Reason/Auth Code “**S006-Rehire Active Database Charter**”.

   Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click “Accept”, you will not be able to go back in and correct it. You will have to delete this personnel action, do a new one and scan all documents again.

7. Tab to “Comment Field” – Enter any comment that will help identify what this action is for, i.e., “Rehire Secretary at DSA effective 4/20/17”. Be sure to include the job title, location and effective date or start date of this action.
8. Click: “Accept”.

Pending Employee Master:

9. In the upper right part of the ribbon, Click: “Detail”.

10. On the “Detail” screen, Click: “Employee Master Main” and Click: “Accept”.
11. On the “Pending Employee Master” screen, Click: “Update”, tab to “Status” and change to “Active”.
12. Tab to “Job Class” and Click: on the ellipse. Charter school job classes will be in the 9400 range. To put job classes in numerical order, click on “Job Code”; to put in alphabetical order, click on “Description”. Click: on the appropriate job class and Click: “Accept”. If the job class does not exist, please contact your HR representative at the district so the job class can be added. Note: If the individual will have more than one job, the job class entered here will be for the primary job.
13. Tab to “Location” and Click: on the ellipse. Click: on your location and Click: “Accept”. Note: This location is the location of the primary job.
14. Tab to “Group/BU” and type 9000 in the box.
15. Tab to “Account” and enter 1300PAYR66CHART53900051000000. It is not necessary to have spaces between numbers when entering the account coding.
16. Tab to “Personnel Status” and Click: on the drop down. Click: on 15-FULL TIME NON BENEFIT ELIGIBLE. For board members and contracted employees, click: on 55-TEMPORARY PART TIME.
17. Tab to “Check Location” and enter your cost center number; or click: on the ellipse and then your location, then click: “Accept”.
18. Tab three times. Note: If the State ID field highlights with an error code, delete the number that appears in that field and then tab.
19. You will now be on the “Dates” tab.
20. Remove the dates and codes that appear in the “Inactive” and “Terminated” fields. To remove the codes, Click: on the drop down boxes and scroll to the bottom. Click: on the blank space after “Unknown”.
21. Tab to “Hired” field and enter the date the employee started or Click: Calendar and select the appropriate date.
22. Tab to “Service” field. Enter the same date that you entered in the “Hired” field.
23. Tab to “Instructional Seniority” field. A date is entered only if the individual is a teacher. The date should be the same date as the Hire Date. If the individual is not a teacher, delete any date that appears in the field.
24. Do not change the date in the “Orig Hire” field.
25. Click: on the Demographics tab and then Click: “Highest Degree”. Make selection from the drop down box.

26. Update any other information on the screen that has changed.

27. Click: on the "Address" tab. Update the individual's address if necessary. Do not complete the "Country" field unless the address is outside the United States. You do not have to enter the "County". In the "Home Phone" field, update the phone number if necessary (i.e., 813-794-2000). In the "Email" field, enter the employee's charter school email address.

28. If the employee's name has changed, enter the previous name in the "Prior Name" field.

29. You do not have to enter anything in the "Supervisor" field.

30. To add more addresses, phone numbers and emergency contacts, go to the bottom of the screen and click on the appropriate label. Once on the screen, Click: "Add" and enter the needed information and Click: "Accept". Repeat for additional information that needs to be added. Click: "Return" to get back to the "Pending Employee Master" screen.

Attaching documents:

31. Prepare the I-9 and supporting documents (driver's license, social security card, passport, etc.) for scanning.

32. Click: "Attach" (paperclip) in the ribbon.

33. In "Document Mappings", scroll down to "Employee I-9". Click: "View Documents". Click: "New". Place the I-9 documents into your scanner.

34. If you are on a PC, Click: "Scan" in the ribbon, select your scanner, then Click: "Scan". Documents will appear in the middle of your screen. Click: "Save" in the ribbon. If you are on a MAC, you will need to scan the I-9 documents to your desktop. Then Click: "New" and then "Import" in the ribbon, select the scanned documents from your desktop and Click: "Open". Either the documents or "Launch in External Viewer" will appear in the middle of your screen. Click: "Save" in the ribbon.

35. In the ribbon, Click: "Close Viewer" and "Yes". You should be back on the Pending Employee Master screen.

36. Click: "Detail" in the ribbon.

User Defined Fields:

37. On the "Detail" screen, Click: "User Defined Fields" and Click: "Accept". If data appears on this screen, click: "Accept".

38. Click: “Add” and tab to “Field ID Code”. Click: on the drop down and select “Fingerprint Rehire Date”. Tab to “Date” and enter date individual was fingerprinted. Tab to “Value” and enter “Approved”. Click: “Accept”.

39. If the individual does not have information already in the User Defined Fields, then click: “Add” and tab to “Field ID Code”. Click: “Fingerprint Rehire Date”. Tab to “Date” and enter date individual was fingerprinted. Tab to “Value” and enter “Approved”. Click: “Accept”.

40. Click: “Return”.

Pending Employee Pay:

Note: Board members and contracted employees do not require job salary records.

41. On the “Detail” screen, Click: “Employee Pay” and Click: “Accept”.

42. Click: “Add”. Note: If you get: “Warning: If all current pending actions are posted, FTE will exceed the maximum for this position” anytime while on this screen, just Click: “OK”.

43. Tab to “Work Start/End”. Enter the date the individual started working.

44. Tab to “Position” and Click: on the ellipse. Click: on the appropriate position and Click: “Accept” and Tab. Information on the Job/Salary record will auto fill. If the position does not exist for your school, please contact your HR representative at the district so the position can be added. Verify “Status” is the same as on the Employee Master. Also verify that the Start Date and the Effective Date are the same as the “Hire Date” on the Employee Master. If not make the necessary corrections.

45. Tab to “Days/Year”. Enter the number of contracted days the employee would normally work in a year.

46. Tab to “Sched Hours”. Enter the number of hours contracted to work per pay period.

47. Tab to “Annual Pay”. Enter the annual salary the employee would receive if they worked the complete year (hourly rate x number of hours per day x number of days per year).

48. Tab to “Hours/Day”. Enter the number of hours contracted to work per day.

49. Tab to “Hours/Year”. Enter the number of hours contracted to work per year.

50. Click: “Accept”.

51. You may be directed to the “FIT and SIT Settings” (W-4) screen. If so, just click: “Accept.

52. Click: “Return”.

Employee Deductions:

Note: Board members and contracted employees do not require deductions to be entered.

Note: Deductions may need to be added later in the year once the amounts are known.

53. On the “Detail” screen, click: “Employee Deductions” and click: “Accept”. The deductions for charter schools may already exist and just need to be updated.

54. To add amounts to an existing deduction, click: on the appropriate deduction and then click: “Accept”.

55. Click: Update”. Tab to “Start Date”, enter the date the deduction starts.

56. If “End Date” has a date other than 12/31/2099, delete that date and enter “12/31/2099”.

57. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

58. Click: “Accept”.

59. To add amounts to other deductions, click: on left or right arrows at the bottom of screen to find appropriate deduction. Repeat the above steps 55-58.

60. To add a new deduction, click: “Add”.

61. Tab to “Deduction” and click: on the ellipse and click: on the appropriate code for the deduction you are entering. Click: “Accept”. Note: codes can be arranged alphabetically by clicking on the Deduction tab.

62. Tab to “Start Date” and enter the date this deduction starts.

63. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

64. Click: “Accept”.

65. Repeat the above steps 60-64 to add other deductions.

66. Click: “Return”.

Employee Certifications:

Certifications will enter this data. You will only be able to view the data.

Employee Education:

Note: Board members and contracted employees do not require education to be completed.

67. On the "Detail" screen, Click: "Employee Education" and Click: "Accept" (may take a while to load).
68. Click: "Add".
69. Click: "Institution Code" and Click: on the appropriate institute. Note: codes are arranged alphabetically by state.
70. Click: "Degree Code" and Click: on the appropriate selection.
71. Click: "Area Code 1" and Click: on the appropriate area.
72. Tab to "State" and enter two digit state code.
73. Tab to "Graduation Date" and enter the date graduated.
74. Tab to "Date Entered" and enter date this record is being entered.
75. Tab to "Verified" and Click: on the box.
76. Click: "Accept".
77. If the individual has other degrees, then repeat steps 68 - 76.
78. Click: "Return".

Employee Years of Service:

Note: Board members and contracted employees do not require years of service to be completed.

79. On the "Detail" screen, Click: "Employee Years of Service" and Click: "Accept".
80. Click: "Add".
81. Click: "Job Category" and Click: on the appropriate categories needed for this individual:
    a. For instructional administrators, select Job Category 1000; for noninstructional administrators, select Job Category 1030. Tab to "Last" and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the "In District", "Out of State", "In Florida" and "Total" columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years

less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

b. For teachers, select Job Category 2000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

c. For all other employees, select Job Category 5000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added. Note: Any subsequent job categories will have years less than the previous school year (i.e., if 2014 was used above, then enter year earlier than 2014).

82. Click: “Accept” and then Click: “Return”.

Employee I-9 Tracking:

83. On the “Detail” screen, Click: “Employee I-9 Tracking” and Click: on “Accept”.
84. Click: “Add”.
85. Click: “Citizenship Status” and Click: on appropriate status from Section 1 of the I-9.
86. If the employee is an “Authorized Alien” or “Lawful Permanent Resident”, tab to “Alien/Admission Number” and enter the ID number from the Authorized Alien or Permanent Resident document.
87. Complete the “Document Type” only if the employee is not a US Citizen. Note: You will need to expand the columns to read the header labels. Tab to “Document Type”, select the document type that is listed in Section 2 of the I-9 (List A; List B; List C). Tab to “Document Title”, select the document that is listed on the I-9. Select the appropriate issuing authority; then enter the document number and expiration date (if any) from the I-9. Repeat the above if another document is listed on the I-9.
88. Click: “Accept” and then Click: “Return”.

Return to Personnel Actions Entry:

89. On the “Detail” screen, Click: “Return” to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: “Release”. If “Release” does not appear in the ribbon, click: “More” and click: “Release”. Answer “Yes” when box appears “Release this action for approval.”

90. Now go back to the upper right of the ribbon. Click: “Output Post”. Select “Display” and Click: “OK”. The personnel action proof will appear. Close the proof window and a “Post Actions” box will appear. Click: “Yes” to post the current action set to “Live” data.

Hiring Current Employee Personnel Actions Entry:

If your employee has another active job with the district (to include being on leave to work at a charter school), that job will be the primary job and will need to be on the Employee Master. Due to location restrictions, time cannot be keyed on employees unless access is granted to the location shown on the Employee Master. You will need to contact your HR representative with Pasco County Schools. They will change the Location on the Employee Master so you can do the personnel action entry.

Open: Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry

1. Click: "Add".
2. In "Employee" block, type in the employee's MUNIS ID number. When you tab, the SSN and name will auto fill.
3. Tab to "Posting Date" Enter the date the person starts working.

Note: If other actions are pending, then the warning "There are already actions pending for this employee" will appear. Check to make sure this action has not already been done or will not conflict with other actions.

4. Tab to "Action Code" – In the drop down box, select the Action Code **"S100-Salary/Job/Location Change"**.
5. Tab to "Reason/Auth Code" – In the drop down box, select the Reason/Auth Code **"SJ27-Additional Job Charter School"**.

Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click "Accept", you will not be able to go back in and correct it. You will have to delete this personnel action, do a new one and scan all documents again.

6. Tab to "Comment Field" – Enter any comment that will help identify what this action is for, i.e., "Additional job Paraprofessional at LLA effective 8/2/17". Be sure to include the job title, location and effective date or start date of this action.
7. Click: "Accept".

Pending Employee Master:

8. In the upper right part of the ribbon, Click: "Detail".
9. On the "Detail" screen, Click: "Employee Master Main" and Click: "Accept".

Attaching documents:

10. Prepare the I-9 and supporting documents (driver's license, social security card, passport, etc.) for scanning.

11. Click: "Attachments" (paperclip) in the ribbon.

12. In "Document Mappings", scroll down to "Employee I-9". Click: "View Documents". Click: "New". Place the I-9 documents into your scanner.

13. If you are on a PC, Click: on "Scan" in the ribbon, select your scanner, then Click: "Scan". Documents will appear in the middle of your screen. Click: "Save" in the ribbon. If you are on a MAC, you will need to scan the I-9 documents to your desktop. Then Click: "New" and then "Import" in the ribbon, select the scanned documents from your desktop and Click: "Open". Either the documents or "Launch in External Viewer" will appear in the middle of your screen. Click: "Save" in the ribbon, Click: "Close Viewer" and "Yes". Repeat the above process (step 11-13) for the remaining documents. They will be attached to the "Employee Service Record" folder.

14. In the ribbon, Click: "Close Viewer" and "Yes". You should be back on the Pending Employee Master screen.

15. Click: "Detail" in the ribbon.

Pending Employee Pay:

Note: Board members and contracted employees normally do not require job salary records. However, if the individual is also employed at another charter school or at the district, you will need to set up a job salary record for your location. The "Status" will be 55-TEMPORARY PART TIME and no salary amount listed in "Annual Pay".

16. On the "Detail" screen, Click: "Employee Pay" and Click: "Accept".

17. Click: "Add". Note: If you get: "Warning: If all current pending actions are posted, FTE will exceed the maximum for this position" anytime while on this screen, just Click: "OK".

18. Tab to "Job Class" and Click: on the Ellipse. Click: on the appropriate job class and Click: "Accept". Note: Job Class from the Employee Master will default in and will need to be changed

19. Tab to "Work Start/End". Enter the date the individual started working.

20. Tab to "Position" and Click: on the ellipse. Click: on the appropriate position and Click: "Accept" and Tab. Information on the Job/Salary record will auto fill. If the position does not exist for your school, please contact your HR representative at the district so the position can be added. Verify "Status" is 15-FULL TIME NON BENEFIT ELIGIBLE. Also verify that the Start Date and the Effective Date are the same as Start Date on the hiring paperwork. If not make the necessary corrections.

21. Tab to “Days/Year”. Enter the number of contracted days the employee would normally work in a year.

22. Tab to “Sched Hours”. Enter the number of hours contracted to work per pay period.

23. Tab to “Annual Pay”. Enter the annual salary the employee would receive if they worked the complete year (hourly rate x number of hours per day x number of days per year).

24. Tab to “Hours/Day”. Enter the number of hours contracted to work per day.

25. Tab to “Hours/Year”. Enter the number of hours contracted to work per year.

26. Click: “Accept”.

27. You may be directed to the “FIT and SIT Settings” (W-4) screen. If so, just click: “Accept.

28. Click: “Return”.

Employee Deductions:

Note: Board members and contracted employees do not require deductions to be entered.

Note: Deductions may need to be added later in the year once the amounts are known.

29. On the “Detail” screen, click: “Employee Deductions” and click: “Accept”. The deductions for charter schools may already exist and just need to be updated.

30. To add amounts to an existing deduction, click: on the appropriate deduction and then click: “Accept”.

31. Click: Update”. Tab to “Start Date”, enter the date the deduction starts.

32. If “End Date” has a date other than 12/31/2099, delete that date and enter “12/31/2099”.

33. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

34. Click: “Accept”.

35. To add amounts to other deductions, click: on left or right arrows at the bottom of screen to find appropriate deduction. Repeat the above steps 31-34.

36. To add a new deduction, click: “Add”.

37. Tab to “Deduction” and click: on the ellipse and click: on the appropriate code for the deduction you are entering. Click: “Accept”. Note: codes can be arranged alphabetically by clicking on the Deduction tab.

38. Tab to “Start Date” and enter the date this deduction starts.

39. Tab to “Employer Ann Amt” (on right side of screen) and enter the annual amount paid by employer.

40. Click: “Accept”.

41. Repeat the above steps 36-40 to add other deductions.

42. Click: “Return”.

Employee Certifications:

Certifications will enter this data. You will only be able to view the data.

Employee Education:

Note: Board members and contracted employees do not require education to be completed.

43. On the “Detail” screen, Click: “Employee Education” and Click: “Accept” (may take a while to load).

44. Click: “Add”.

45. Click: “Institution Code” and Click: on the appropriate institute. Note: codes are arranged alphabetically by state.

46. Click: “Degree Code” and Click: on the appropriate selection.

47. Click: “Area Code 1” and Click: on the appropriate area.

48. Tab to “State” and enter two digit state code.

49. Tab to “Graduation Date” and enter the date graduated.

50. Tab to “Date Entered” and enter date this record is being entered.

51. Tab to “Verified” and Click: on the box.

52. Click: “Accept”.

53. If the individual has other degrees, then repeat steps 44 - 52.

54. Click: “Return”.

Employee Years of Service:

Note: Board members and contracted employees do not require years of service to be completed.

Note: Complete this section only if employee does not have the appropriate job categories.

55. On the “Detail” screen, Click: “Employee Years of Service” and Click: “Accept”.

56. Click: “Add”.

57. Click: “Job Category” and Click: on the appropriate categories needed for this individual:

    a. For instructional administrators, select Job Category 1000; for noninstructional administrators, select Job Category 1030. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    b. For teachers, select Job Category 2000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    c. For all other employees, select Job Category 5000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

58. Click: “Accept” and then Click: “Return”.

Return to Personnel Actions Entry:

59. On the “Detail” screen, Click: “Return” to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: “Release”. If “Release” does not appear in the ribbon, click: “More” and click: “Release”. Answer “Yes” when box appears “Release this action for approval.”

60. Now go back to the upper right of the ribbon. Click: “Output Post”. Select “Display” and Click: “OK”. The personnel action proof will appear. Close the proof window and a “Post Actions” box will appear. Click: “Yes” to post the current action set to “Live” data.

61. Notify your HR representative with Pasco County Schools that you have posted your personnel action and they can switch the Location on the Employee Master back to the original location.

Change Job Class for Current Employee Personnel Actions Entry:

If your employee has another active job with the district (to include being on leave to work at a charter school), you will not be able to access their records due to location restrictions. Contact your HR representative with Pasco County Schools and they will change the Location on the Employee Master so you can do the personnel action entry.

Open: Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry

1. Click: “Add”.

2. In “Employee” block, type in the employee’s MUNIS ID number. When you tab, the SSN and name will auto fill.

3. Tab to “Posting Date” Enter the date the change is taking place.

Note: If other actions are pending, then the warning “There are already actions pending for this employee” will appear. Check to make sure this action has not already been done or will not conflict with other actions.

4. Tab to “Action Code” – In the drop down box, select the Action Code **“S100-Salary/Job/Location Change”**.

5. Tab to “Reason/Auth Code” – In the drop down box, select the Reason/Auth Code **“S008-Salary/Job/Location Change Charter School”**.

Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click “Accept”, you will not be able to go back in and correct it. You will have to delete this personnel action, do a new one and scan all documents again.

6. Tab to “Comment Field” – Enter any comment that will help identify what this action is for, i.e., “Change from Paraprofessional to Elementary Teacher at Imagine School effective 8/2/17”. Be sure to include the job title, location and effective date or start date of this action.

7. Click: “Accept”.

Pending Employee Master:

Note: If your employee has another active job with the district (to include being on leave to work at a charter school), that job will be the primary job and will need to be on the Employee Master. You do not need to make any changes to the Employee Master. Click: “Detail” and skip to step 73.

8. In the upper right part of the ribbon, Click: “Detail”.

9. On the “Detail” screen, Click: “Employee Master Main”, click: “Accept” and the “Update”.
10. Tab to “Job Class” and Click: on the ellipse. Charter school job classes will be in the 9400 range. To put job classes in numerical order, click: “Job Code”; to put in alphabetical order, click: “Description”. Click: on the appropriate job class and Click: “Accept”. If the job class does not exist, please contact your HR representative at the district so the job class can be added. Note: If the individual will have more than one job, the job class entered here will be for the primary job.
11. Click: “Accept” and “Return”.

Pending Employee Pay:

Note: Board members and contracted employees normally do not require job salary records. However, if the individual is also employed at another charter school or at the district, you will need to set up a job salary record for your location. The “Status” will be 55-TEMPORARY PART TIME and no salary amount listed in “Annual Pay”.

12. On the “Detail” screen, Click: “Employee Pay” and Click: “Accept”.
13. Click: on the job you are ending and click: “Accept”.
14. Click: “Update”. Note: If you get: “Warning: If all current pending actions are posted, FTE will exceed the maximum for this position” anytime while on this screen, just Click: “OK”.
15. Tab to “Work Start/End” and enter last day in this job.
16. Tab to “End Date” and enter last day in this job.
17. Tab to “Pay Status”, click: on drop down, select “Inactive” and then click: “Accept”. Note: If the “Calendar” field on the Cycles/Other tab highlights, click: on the drop down and scroll to the bottom. Click on the blank space after “620-206 Psychologist” and then click: “Accept”.
18. Click: “Add”. Note: If you get: “Warning: If all current pending actions are posted, FTE will exceed the maximum for this position” anytime while on this screen, just Click: “OK”.
19. Tab to “Job Class” and Click: on the Ellipse. Click: on the appropriate job class and Click: “Accept”. Note: Job Class from the Employee Master will default in. If not correct, change job class.
20. Tab to “Work Start/End”. Enter the date the individual started working.
21. Tab to “Position” and Click: on the ellipse. Click: on the appropriate position and Click: “Accept” and Tab. Information on the Job/Salary record will auto fill. If the position does not exist for your school, please contact your HR representative at the district so the position can be added. Verify “Status” is 15-FULL TIME NON BENEFIT ELIGIBLE. Also verify that the Start Date and the Effective Date are the same as Start Date on the hiring paperwork. If not make the necessary corrections.

22. Tab to “Days/Year”. Enter the number of contracted days the employee would normally work in a year.

23. Tab to “Sched Hours”. Enter the number of hours contracted to work per pay period.

24. Tab to “Annual Pay”. Enter the annual salary the employee would receive if they worked the complete year (hourly rate x number of hours per day x number of days per year).

25. Tab to “Hours/Day”. Enter the number of hours contracted to work per day.

26. Tab to “Hours/Year”. Enter the number of hours contracted to work per year.

27. Click: “Accept”.

28. Click: “Return”.

Employee Years of Service:

Complete this section only if employee does not have the appropriate categories for the new job.

Note: Board members and contracted employees do not require years of service to be completed.

29. On the “Detail” screen, Click: “Employee Years of Service” and Click: “Accept”.

30. Click: “Add”.

31. Click: “Job Category” and Click: on the appropriate categories needed for this individual:

    a. For instructional administrators, select Job Category 1000; for noninstructional administrators, select Job Category 1030. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    b. For teachers, select Job Category 2000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In District”, “Out of State”, “In Florida” and “Total” columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

    c. For all other employees, select Job Category 5000. Tab to “Last” and enter the previous school year (i.e., if the current school year is 2015, then enter 2014). Zeros will default into the “In

District", "Out of State", "In Florida" and "Total" columns. If individual has previous experience, Click: on next line to add next category and enter the appropriate previous category. Tab to the column(s) that identify where the experience was obtained and enter the number of years. Repeat the above until all needed previous categories are added.

32. Click: "Accept" and then Click: "Return".

Return to Personnel Actions Entry:

33. On the "Detail" screen, Click: "Return" to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: "Release". If "Release" does not appear in the ribbon, click: "More" and click: "Release". Answer "Yes" when box appears "Release this action for approval."

34. Now go back to the upper right of the ribbon. Click: "Output Post". Select "Display" and Click: "OK". The personnel action proof will appear. Close the proof window and a "Post Actions" box will appear. Click: "Yes" to post the current action set to "Live" data.

35. Notify your HR representative with Pasco County Schools that you have posted your personnel action and they can switch the Location on the Employee Master back to the original location.

Terminating Employee Personnel Actions Entry:

If your employee has another active job with the district, that job will be the primary job and will need to be on the Employee Master. Due to location restrictions, time cannot be keyed on employees unless access is granted to the location shown on the Employee Master. You will need to get with district Human Resources and have the location changed on the Employee Master to your location so you can do the personnel action.

Open: Human Resources/Payroll -> Human Resources -> Personnel Actions -> Actions Entry

1. Click: "Add".

2. In "Employee" block, type in the employee's MUNIS ID number. When you tab, the SSN and name will auto fill.

3. Tab to "Posting Date". Enter the effective date the person is terminating. The Effective Date is the employee's last day as an employee.

   Note: If other actions are pending, then the warning "There are already actions pending for this employee" will appear. Check to make sure this action has not already been done or will not conflict with other actions.

4. Tab to "Action Code" – In the drop down box, select the Action Code "T100-Terminate".

5. Tab to "Reason/Auth Code" – In the drop down box, select the appropriate Reason/Auth Code for Charter Schools from the list.

   Note: You must use a Reason/Auth Code. This helps to further define the action. This is VERY IMPORTANT. If you do not choose a correct corresponding reason, once you click "Accept", you will not be able to go back in and correct it. You will have to delete this personnel action, do a new one and scan all documents again.

6. Tab to "Comment Field" – Enter any comment that will help identify what this action is for, i.e., "Resigned Paraprofessional at LLA effective 6/2/17". Be sure to include the job title, location and effective date or start date of this action.

7. Click: "Accept".

Pending Employee Master:

Note: If the charter school job is not the primary job, do not enter a termination date or code on the Dates tab. Skip to step 12.

8. In the upper right part of the ribbon, Click: "Detail".

9. On the “Detail” screen, Click: “Employee Master Main” and Click: “Accept”.
10. Click: “Update”, tab to “Dates” tab and enter the effective date of termination (the last day the employee was employed) in the “Terminated” field.
11. Tab to the “Code” field and Click: on the drop down box. Click: on the appropriate term code and then Click: “Accept”.
12. Click: on “Return” in the ribbon.

Pending Employee Pay:

13. On the “Detail” screen, Click: “Employee Pay” and Click: “Accept”. If the individual has more than one job, make sure the one you are on is the charter job class (pay type 190).
14. Click: “Update”. Note: If you get: “Warning: If all current pending actions are posted, FTE will exceed the maximum for this position” anytime while on this screen, just Click: “OK”.
15. Tab to “Work Start/End” and enter the last day the employee was employed.
16. Tab to “End Date” and enter the last day the employee was an employed.
17. Tab to “Pay Status” and Click: on the drop down box. Select: “I-Inactive”.
18. Click: “Accept” and then Click: “Return”. Note: If the “Calendar” field on the Cycles/Other tab highlights, click: on the drop down and scroll to the bottom. Click on the blank space after “620-206 Psychologist” and then click: “Accept” and “Return”.

Return to Personnel Actions Entry:

19. On the “Detail” screen, Click: “Return” to get back to the Personnel Actions Entry. On the Personnel Action Entry screen, go to the upper right of the ribbon. Click: “Release”. If “Release” does not appear in the ribbon, click: “More” and click: “Release”. Answer “Yes” when box appears “Release this action for approval.”
20. Now go back to the upper right of the ribbon. Click: “Output Post”. Select “Display” and Click: “OK”. The personnel action proof will appear. Close the proof window and a “Post Actions” box will appear. Click: “Yes” to post the current action set to “Live” data.