# PeopleSoft HCM Site Admin Job Aid Packet

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Updated 3/21/2017
How to Sign In to PeopleSoft HCM

To use the Oracle PeopleSoft Enterprise online system you must have a valid SDUSD employee ID number and password.

The Oracle PeopleSoft Enterprise online system can be used on a PC or MAC, with Internet Explorer, Firefox or Safari web browsers.

This Job Aid illustrates how to sign in to PeopleSoft HCM.

1. Launch your web browser of choice from your computer desktop, go to the SDUSD website: www.sandiegounified.org

   If necessary, sign in to the Staff Portal to access the SDUSD Inside Unified Employee Portal. Or if you are already signed in, skip to step 2 below.

2. From the Inside Unified Employee Portal click PeopleSoft - HCM.

January 2016
How to Sign In to PeopleSoft HCM

3. Enter your SDUSD Employee ID number into the **User ID** field.
   Enter your password into the **Password** field.
   Click the **Sign In** button.

4. You can then navigate to any location in PeopleSoft HCM by single-clicking **Main Menu** at the top and then click any subsequent menus that appear after that.

**NOTE:** At the top of the screen there are “Breadcrumbs”. Breadcrumbs are a path you can click if you want to go back a page or more. Going from left to right, they keep track of what you clicked to arrive at this page.

5. To sign out, click **Sign out** in the upper right corner.

For more information about how to use the Oracle PeopleSoft Enterprise software system in our school district, as well as to find training opportunities and support, log in to the **Staff Portal** to access the **SDUSD Inside Unified Employee Portal**.

Under **Shortcuts**, click **Technical Support/Help Desk > PeopleSoft**
The HR Manager Dashboard will streamline and simplify management’s use of PeopleSoft HR by allowing easy access to view their direct team’s information, view alerts, run reports and queries, access commonly used PeopleSoft HR pages, and view manuals and job aids, all from one convenient page in PeopleSoft. The instructions below show how to first set up and personalize the HR Manager Dashboard (one-time only), and then how to use it.

Setting up Your Manager Dashboard

1. To set up the Manager Dashboard to appear on your PeopleSoft HCM Home page, click the Content link.
   ![Content Link](image1)

2. Select all the Common Workcenter Pagelets and the HCM Dashboard checkboxes.
   ![Select All Pagelets](image2)

3. Click Save. This will return you to the Manager Dashboard home page.
   ![Save Button](image3)

OR

4. Click Return to Home if you are viewing this screen and not making any changes.
   ![Return to Home](image4)
PeopleSoft HR Manager Dashboard

5. Click the **Layout** link at the top of the Manager Dashboard page.

6. Define layout by selecting either a 2 or 3 column layout style you wish to display on your Dashboard.

7. Identify the pagelets that should appear in each column. Move these pagelets from one column to the next by selecting the pagelet and clicking the left or right arrows.

8. Click **Save**. This will return you to the **Manager Dashboard** home page.

OR

9. Click **Return to Home** if you are viewing this screen and not making any changes.

**NOTE:** The purpose of the above steps is to define the content and layout of your HR Manager Dashboard. Steps 1 thru 9 need only be executed once, unless you later want to remove a pagelet or change the layout.
1. The Alerts pagelet displays Birthday Alerts and Anniversary Alerts (based on employee Hire Date) for your direct reports.

2. The Reports/Processes pagelet displays selected reports and processes on the Dashboard.
   2a. Click the Report name to access the report run control page and execute the report. Report will open in a new browser tab. (Directions for running reports and processes are in the job aids on the Links pagelet)
   2b. Click the PeopleSoft Page name to access the page. Page will open in a new browser tab.

3. The Queries pagelet displays selected queries on the Dashboard.
   3a. Click the Query name to access the page to execute the query. Query will open in the current browser tab, replacing the Dashboard.
   3b. When finished view query results, Click the Back Button to Return to the Manager Dashboard home page.
4. The Links pagelet displays frequently used Manuals and Job Aids at the District.

4a. Click the Manuals and Job Aids name to access the document. The document will open in a new browser tab.

5. The Direct Line Reports pagelet displays information about a manager’s direct reports, including: job details, contact information, licenses and certifications, education and career history. Direct reports are determined by the “Reports To” position on the employee’s Job Data record. “Direct reports” refers to employees for whom you are responsible for signing their timecards. If the direct reports shown in this pagelet are not correct (either missing employees who report to you or showing employees or vacant positions who do not report to you), you can correct it on the “Maintain Reports To Info” page in PeopleSoft. See the How to Maintain Reports to Information job aid for assistance.

5a. Click the Summary tab to view employee’s name and job title.

5b. Click the Job Details tab to view a high level overview of employee’s job data.

5c. The last column of the Job Details tab displays a schedule icon, if applicable. This indicates where an employee is today. The column displays only one icon to indicate the employee schedule for the day, even if more than one schedule applies.
PeopleSoft HR Manager Dashboard

5d. Click the Contact tab to view employee’s contact information.

5e. Click the Show all columns button to view all columns on one screen.

5f. Click the Show all columns button to go back to the Show Tabs screen.

5g. Click the employee’s name on any tab in the Direct Line Reports pagelet to access the Talent Summary page and view employee’s job data, licenses and certifications, education and career history.

5h. Click the Return to Manager Dashboard link to return to the Manager Dashboard home page.
How to Maintain Reports To Information

This Job Aid illustrates how to maintain Reports To Information in PeopleSoft HCM. A manager or supervisor for each department is responsible for maintaining the Reports To position number for each position in the department. This means identifying the position number of the manager or supervisor who approves each employee's time (for example, their absence requests) in the department.

1. You have signed in to PeopleSoft HCM. Begin from the Main Menu (Homepage). Navigate to the Maintain Reports To Info page within the Organizational Development area.

   Click Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Maintain Reports To Info

2. Enter the Department ID for which you want to maintain the Reports To information. Click Get Employees.

   NOTE: Department 5998 cannot be entered. Only managers and supervisors have access to this page.
How to Maintain Reports To Information

3. Click the modify checkbox for each row on which you want to enter or update the **Reports To Position Number**. Or, click the **Select All** button at the bottom of the page to select all rows. The **Reports To Position Number** field becomes editable for all of the selected rows. Scroll down to see all positions in the department.

4. Enter the **Reports To Position Number** for each row you selected.

Or click the lookup (magnifying glass icon) to search for the position number by job title, department, job code, or incumbent name. Only manager and supervision positions are shown.

**NOTE:** Repeat step 4 above until all **Reports To Position Numbers** have been completed and verified as accurate.
How to Maintain Reports To Information

5. Click **Save Reports To Info** button at the bottom left of the screen.

**NOTE:** If a **Reports To Position Number** is inactive or is not a manager or supervisor position, an error message (see below) will appear and the invalid position number will be highlighted in red. Click the **OK** button and enter or select a valid position number from the lookup.

![Error Message]

6. To enter **Reports To Information** for another department, click the **Return To Search** link at the bottom left of the screen. **Return To Search** Resume from step 2 in this job aid for the new department.

**NOTE:** Please return to the **Maintain Reports To Info** page to update **Reports To Information** whenever there is a reporting structure change in your department or when new positions are added.
Monthly Payroll Checklist for Managers

This checklist is provided to managers to assure tasks required to monitor and audit payroll transactions will be completed each month. This checklist must be completed and signed by each site administrator/department head monthly.

To Do – Reconciling Your Payroll

Prior to the timekeeping/payroll deadline (2 payrolls and 2 deadlines each month):

☐ Run the Time Summary Report to review positive hours and absences that have been reported. Look for: excessive overtime, absence reporting, etc. This report should be run regularly (weekly) to assure what is being entered into Time and Labor is accurate.

This can also be used as a tool to review employee hours and absences over periods of time where excessive absences, for example, are being monitored. It can be used to evaluate overtime expense year over year as well. Download to Excel to sort and filter what you need.

☐ Validate back up documentation (time cards and leave requests) has been provided for all absences and hours reported.

☐ Make sure your timekeeper runs the SAMS Job Report daily. Make sure substitutes are signing in.

☐ Validate absences have been reported in Time and Labor by your timekeeper for employees reporting to SAMS. SAMS populates hours to Time and Labor for substitutes but not absences for absent employees.

☐ Make sure your timekeeper is reporting hours and absences for each reporting period in Time and Labor. Meaning, earnings and absences must be reported in the earnings period they are earned/worked or the absences occur.

☐ Make sure your timekeeper is checking your roster/Filled Position Report each month for employees you do not recognize or for employees working but not on your roster. Have the timekeeper notify Payroll immediately of any discrepancies.

☐ Run the Cross Site Account Code Charges Report regularly during the month and one last time prior to the payroll deadline. If there are charges being made against your department that shouldn't be, have your timekeeper contact the site charging and correct the entries prior to the payroll deadline. Sign the final document for the payroll deadline and file with payroll records.

☐ Run the Site Account Code Charges Report (follow the same directions above for Cross Site Account Code Charges Report). Make sure your site is not charging against another site in error. Any errors should be corrected by your timekeeper. Sign the document and file with payroll records.
Monthly Payroll Checklist for Managers

This checklist is provided to managers to assure tasks required to monitor and audit payroll transactions will be completed each month. This checklist must be completed and signed by each site administrator/department head monthly.

To Do – Auditing Your Payroll

Following the close of the payroll (2 payrolls per month) have your timekeeper prepare these reports for your review. They will be notified by listserv when these steps can be taken:

☐ Run the Audit Paid to Reported Time Report (official payroll audit report). Review reported hours and absences (right side of the document) to what was paid (left side of the document). Sign the document and file with payroll records. For assistance with using this document or to review your payroll, contact the payroll director for an overview.

☐ Run the Filled Positions Report (also referred to as a roster). Review filled positions along with the Audit Paid to Reported Time Report. This will help you reconcile who is active, working and being paid at your site along with critical elements of pay like FTE. File this report with your Audit Paid to Reported Time Report.

☐ Make sure all employees appearing on the Audit Paid to Reported Time Report are your employees or did work for you during the pay period. Contact Payroll regarding any discrepancies.

☐ Run the Vacation Balance Report to review employee balances approaching or exceeding maximum accrual (328 hours).

Please sign and date this checklist each month and file with your payroll records.

Signature _________________________________

Date _________________________________
****IMPORTANT REPORTING INFORMATION-PLEASE REVIEW CAREFULLY****

Timekeepers and Site Administrators/Managers,

The following is provided regarding reporting requirements and which reports should be used to review and validate payroll. Below is a description of each of the reports that are to be used by you and your administrators to validate your payroll and when to run them. Please refer to the Time and Labor Manual for specific instructions on running these reports in PeopleSoft HCM v9.2.

In addition to reporting requirements, I have provided some clarification on what the 90-day window for making prior period adjustments in Time and Labor should be used for. Below is a description of that window and what types of adjustments should and should not be made using it.

If you have questions regarding this information or other matters related to your payroll, please don’t hesitate to contact your payroll specialist. Thank you for all you do!

Sue Weir
Director, Payroll/Benefits

_The highest reward for a person's toil is not what they get for it, but what they become by it._

...John Ruskin

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**90-DAY WINDOW IN TIME AND LABOR FOR PRIOR PERIOD ADJUSTMENTS:**

A Prior Period Adjustment is a change in reported time in Time and Labor for a pay period that has already been processed through Payroll. **These prior period adjustments should be made for reported time (examples: wrong TRC, employee was underpaid, overpaid) not for trying to adjust charges that may have been applied to an inappropriate HCM Account Code.** In the event an employee has had time reported, paid and subsequently charged to the wrong HCM Account Code, **you must contact your Financial Planning and Development Analyst in the Financial Planning, Monitoring and Accountability Department to adjust the expense.** Once a payroll has been processed, paid and the charges have been distributed to the General Ledger, your analyst must intervene.

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**TIME AND LABOR REPORTS AND HOW TO USE THEM:**

**Audit Paid to Reported Time Report:**
This report is an official audit record. The administrator must review and sign this document to validate the payroll.
Payroll Department

This report shows you the earnings/leave reported and paid for each employee at your site. The report must be run for each payroll each month after the payroll processes. Run the report 10 days after the payroll processes (10th of the month for the salaried payroll and 20th of the month for the hourly payroll).

**Site Account Code Charge Monitor Report:**
This report is an official audit record. The administrator must review and sign this document to validate the payroll.

This report is provided for sites to monitor whether time that is supposed to be charged to your site is being charged to another site (HCM Account Code contains a department value that is not your own). Unlike the Audit Paid to Reported Time Report, this report includes time that has been reported in Time and Labor but has not yet been paid. To use this report effectively, it must be run and validated weekly. This way if there is time being charged to a department other than your own, you can make the changes before the timekeeping deadline. **The report should then be run prior to your deadline for submitting time on both the salaried payroll and the hourly payroll for review and signature by the site administrator.**

**Cross Site Account Code Charges Report:**
This report is an official audit record. This report must be signed by an administrator and kept on file for auditing purposes.

This report works in combination with the Site Account Code Charge Monitor Report shown above. While the Site Account Code Charge Monitor Report shows if you are hitting other Department’s Budgets, the Cross Site Account Code Charges Report shows you if other Departments are hitting yours. This report includes all employees whose time reported in Time and Labor is being charged to a HCM Account Code containing the department value of your site (first 4 digits of an account string). As is the case with the Site Account Code Charge Report this report needs to be run weekly. That way if there is time being charged by another department to your site account, you can contact the timekeeper at the other site to make the correction before payroll is run. **The report should then be run prior to your deadline for submitting time on both the salaried payroll and the hourly payroll for review and signature by the site administrator.**

**IMPORTANT:** This report is **not** meant to be used for budgeting purposes. If you find charges after the payroll has processed that do not belong to your department, you should contact your analyst in the Financial Planning, Monitoring and Accountability Department to assist you with an expense transfer. **Do not try to reverse these charges in Time and Labor.**

**T&L Blank Account Codes Report**
This report is **not** an official audit record. **However, this is a critical report to run on a regular basis to assure account codes are being reported accurately.**

The T&L Blank Account Codes Report displays substitutes whose time was pulled in from SAMS to Time and Labor via an interface. Some of the data pulled into Time and Labor uses default HCM Account Codes for district related absences (i.e. professional development for teachers). Timekeepers
must change the default HCM Account Codes for each of these records. This report is your tool for identifying the records that need to be changed. **This report should be run no less than weekly throughout the month. Changes to HCM Account Codes must be done at the time you run the report and shouldn’t be held until just prior to the timekeeping deadline.**

**Time Summary Report:**
This report is **not** an official audit record and does not need to be signed by an administrator.

This report is provided so that you may review reported time. It is a report to be used as a tool for reviewing reported time in a summary fashion. You can run this report for an entire department or for an individual employee and for a range of dates. The dates you enter represent dates on which time was reported and actual work days included within the range.

**Leave Balance and Vacation Balance Reports (Leave Information by Department and Vacation Balances of 300 or >):**
This report is **not** an official audit record and does not need to be signed by the administrator.

These reports are provided so that you may review leave balances for employees. They are reports to be used as tools for reviewing leave balances and for assuring vacation accruals are kept under the maximum of 328 hours. These reports should be run following the close of the monthly payroll or the last day of each month. Leave accruals are run twice monthly: 1) the 15th of the month “adds” to leave balances are accrued and 2) the day after the monthly payroll closes “takes” are deducted from balances.
**How to Run the Audit Paid to Reported Time Report**

This job aid shows you how to run the Audit Paid to Reported Time report. This report shows you the earnings/leave reported and paid for each employee at your site. Run the report approximately 10 days after the payroll processes. You will receive an email notification each month via the Time & Labor listserv when you can run the report. The administrator must review, approve and sign this document to validate the payroll.

1. Navigate to: **Main Menu > Payroll for North America > U.S. Quarterly Processing > Audit Paid to Reported Time**

2. Click the **Add a New Value** Tab

3. Enter a **Run Control ID**. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)

4. Click the **Add** button.

5. In the **Pay End Date** field, enter the date for the payroll you need to run. **Example:** For the May 31, 2014 payroll you would enter 05/31/14. For the June 10, 2014 (off cycle) payroll you would enter 06/01/14

6. In the **Department** field enter your 4-digit department number, or click the and select your department number.

7. Click **Save**. (Only the first time you are setting up your report)

8. Click **Run**.

9. Select **PSNT** from the **Server Name** drop-down menu. You only need to do this the first time you are setting up your report.

10. Click **OK**.

Oct 2014
How to Run the Audit Paid to Reported Time Report

11. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

12. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, hit the Refresh button until they change to the correct status.)

13. Click the Details link.

14. Click the View Log/Trace link. This will bring you to a page that shows you three files.

15. Of the three files, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 11. The report will open in Adobe Acrobat Reader.

- Print/Save the report(s).

- Have the principal/dept manager review/approve and sign.

- Retain the report(s) in the binder with the corresponding time data.
# Audit Paid to Reported Time Report Sample

<table>
<thead>
<tr>
<th>Name/EmplID</th>
<th>Check Number</th>
<th>Total Gross, Job Code</th>
<th>TRC, QTY, DUR</th>
<th>Oprid (Timekeeper)</th>
<th>Position Number</th>
<th>Position Description</th>
<th>Account Code</th>
<th>Status</th>
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<td>Chris Doe</td>
<td>127977</td>
<td>3282197</td>
<td>1,625.53</td>
<td>6485</td>
<td>1,625.53</td>
<td>15.00</td>
<td></td>
<td>20010937/Spec Ed Aest</td>
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<tr>
<td></td>
<td>148391</td>
<td>3283950</td>
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<td>6102</td>
<td>98.46</td>
<td>16.41</td>
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<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>REG 6.00</td>
<td>REG 6.00</td>
<td>REG 6.00</td>
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<td>SD_SAMS_INTRPC 0124000100024561500010000</td>
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<tr>
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<tr>
<td></td>
<td></td>
<td></td>
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<td>REG 4.00</td>
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<tr>
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<td></td>
<td></td>
<td>REG 12.00</td>
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<td>16721092</td>
<td>5,256.18</td>
<td>2106</td>
<td>4,947.19</td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td>2106</td>
<td>93.03</td>
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<td>91.90</td>
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</table>
Audit Paid to Reported Time Report Validation Fields Explanation

The Job Code and Position# fields are central to understanding the reported total wages for the employee. Reporting sites are validating earnings and paid time represented by the Job Code that is in bold type.

The report shows reported hours and paid earnings. The column, Hourly Rt/Qty Reported and DUR (date of the earning) will, for each fund or Position#, have repeat line entries and have the same date when earnings are split funded or are based on the employee having multiple positions. The earnings are grouped by Position# or fund and will show the same date for the same earnings code for each respective group. However, the time shown under the column Oth Hrs and the amount shown under Oth Erns shows the actual proportional time and earnings for that date shown under the DUR column for the specific Position# or fund. In the below example, the employee has two positions (shown under the Position#/Position Description) and therefore, Hourly Rt/ Qty Reported column repeats with the same dates for the full quantity reflecting the two positions. This part of the report is unable to reflect the proration based on the percentage for either split funding or having multiple positions. The Erncd, Oth Hrs and Oth Erns columns show the actual charge after the percentage was applied to the multiple occurrences showing under the Qty Reported and DUR columns. Under column RegEarns/TRC, the earnings applicable to the specific position are shown.

Also, this example shows a common exception in the reports. The department is 0352, but the budget string is showing department 5445 as the paying department. This happens when the position number is joined to a department other than the paying department. This employee will also show on 5445’s Audit Reported to Paid Time Report since that is the paying department.

<table>
<thead>
<tr>
<th>Sample Report</th>
</tr>
</thead>
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<tr>
<td><strong>Report ID:</strong> EDP4988</td>
</tr>
<tr>
<td><strong>Name:</strong> Chris Doe</td>
</tr>
<tr>
<td><strong>Empid Ch #:</strong> 1811682</td>
</tr>
<tr>
<td><strong>Job Code:</strong> 2000</td>
</tr>
<tr>
<td><strong>Hourly Rt:</strong> 1.60</td>
</tr>
<tr>
<td><strong>Oth Hrs:</strong> 0.00</td>
</tr>
<tr>
<td><strong>Stat:</strong> TP</td>
</tr>
</tbody>
</table>

**Job Code**  
Job Code (In bold type) is associated with Position# and shows the amount earned by the staff member in this position at this site. The amount earned is listed under the column Reg Earns. Sites validate the wages paid for the earnings reported that are for the Job Code shown in bold type.

**Position#**  
The specific position in the number of positions allocated for the particular Job Code. For example, if the site was authorized 10 teachers for Job Code 2000, then positions numbers could range from 20000001 thru 20000010. An employee may have multiple positions for the same Job Code.

Updated 9/30/2014
Reg Earns  The earnings for that position in the preceded Job Code. This/these amount(s) may not equal the Total Gross if the staff member had earnings at another location.

Total Gross  This is the employee’s paycheck and in most cases equals the amount(s) associated with the Job Code. If an employee has earnings from multiple locations, the location running the report sees their portion following the Job Code, but their portion will not equal the Total Gross.

Erncd  The code the total earnings are charged to for the report period.

Oth Hrs  The total hours being paid for the Erncd for the report period.

Oth Erns  The total being paid for the report period for the Erncd.

TRC  Shows the Time Reporting Code for the hours entered by the Time Keeper identified under Oprid. If multiple funding sources fund this Time Reporting Code, then the line will repeat and not equal the total listed in the Erncd and Oth Hrs reported. The assignment funding percentage is not included on the report for the associated TRC therefore the Qty appears overstated.

Qty/Reported  Number of hours (daily) being reported for the TRC.

Dur  The date for which the TRC is reported.

Stat  Processing status of the entry, TP = Taken by payroll

Oprid  The employee’s PeopleSoft ID number who entered the time into the system.

Account Code  Budget string charged for the TRC.
How to Run the Time Summary Report

This job aid shows you how to run the Time Summary report. Run the Time Summary Report to review positive hours and absences that have been reported. This report should be run weekly to assure what is being entered into Time and Labor is accurate.

1. Navigate to: Main Menu > Time and Labor > Reports > Time Summary
2. Click the Add a New Value Tab
3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)
4. Click the Add button.
5. In the Group ID field enter your Salary, Hourly Group ID, or click the icon and select your Group ID. (For the subs report, the Group ID is 5998H, check the Substitute Assignments box, and enter your Location Code ex: 0000A)
6. Enter the From Date and Thru Date for the report you are running. Run report weekly.
7. Select a Primary Sort option from the drop-down menu.
8. Click Save. (Only the first time you are setting up your report)
9. Click Run.
10. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.
11. Click OK.

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12. After you click **OK**, you will be given a **Process Instance Number** and returned to the Report Page. Click the **Process Monitor** link to view the status of the report.

13. Your report is done processing when the **Run Status** reads “Success” and **Distribution Status** reads “Posted” (If not, hit the **Refresh** button until they change to the correct status.)

14. Click the **Details** link.

15. Click the **View Log/Trace** link. This will bring you to a page that shows you three files.

16. Of the three files, choose the one with the **.PDF** extension. The name of the report will also contain the **Process Instance Number** that was assigned to it in step 12. The report will open in Adobe Acrobat Reader. You can now View, Print or Save the report.
How to Run the Time Summary Report

Primary Sort Definitions:

- If you select Sort Option of *Acct Code* (which is the default selected item), the report output will be sorted by Account Code (Budget Number).

- If you select Sort Option of *Comments, DUR* (Date under Report), *Empl Type* (Employee Type), *Emplid* (Employee ID), or *Name* the report output will be sorted by the selected field.

- The last sort option of *Xcl/CSV* has been provided in order to improve download capability to a .csv format. The Xcl/CSV output report does not include the Time & Labor Comments field and the header lines have been removed. For step-by-step instructions see [How to Run the Time Summary Report to Excel](how-to-run-the-time-summary-report-to-excel) job aid.
How to Run the Time Summary Report to Excel

This job aid shows you how to run the Time Summary Report to Excel.

1. Navigate to: **Main Menu > Time and Labor > Reports > Time Summary**

2. Click the **Add a New Value** Tab

3. Enter a **Run Control ID**. Name the report something unique that you will remember. You only need one **Run Control ID** for this report. There should be no spaces in the **Run Control ID**. Use (_) as a separator. (See screenshot example)

4. Click the **Add** button.

5. In the **Group ID** field enter your Salary or Hourly Group ID or click the **icon and select your Group ID.**

6. Enter the **From Date** and **Thru Date** for the report you are running.

7. Select **Xcl/CSV** from the **Primary Sort** drop-down menu.

8. Click **Save**. (Only the first time you are setting up your report)

9. Click **Run**.

10. Select **PSNT** from the **Server Name** drop-down menu. You only need to do this the first time you are setting up your report.

11. Select **CSV** from the **Format** drop-down menu. You only need to do this the first time you are setting up your report.

12. Click **OK**.

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How to Run the Time Summary Report to Excel

13. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

14. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, click the Refresh button until they change to the correct status.)

15. Click the Details link.

16. Click the View Log/Trace link. This will bring you to a page that shows you three files.

17. Of the three files, choose the one with the .csv extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 13. You have the option to Open, Save or Save As in Microsoft Excel.

NOTE: The Xcl/CSV output report does not include the Time & Labor Comments field and the header lines have been removed.
Time Summary Report - by Employee

Occasionally, you may receive a request for a summary of an employee’s reported time. The Time Summary Report has that capability. In addition to running the report for your entire department for a given period, you may also run the report for a single employee for as broad a time period as you choose.

The screen shot below shows the EmplID field and how to specify a single employee. In this example, an employee ID has been typed in and the From Date has been entered as 02/01/13, and the Thru Date 04/15/13. The date range can be for as long or short a period as you choose.

On the next page notice that the output report includes everything that has been reported in Time and Labor for the employee, for the date range you entered. This report can also be run and downloaded to Excel. (See Time and Labor manual for step-by-step instructions). We hope that this report will be useful to you and your Administrator.

NOTE: When running this report for a visiting teacher or classified sub, use the group 5998H and the employee’s ID. The report will return a record of all dates reported for the employee within your date range regardless of the site where the employee reported to work. (To see only those who reported to your site, you must enter Group ID 5998H, From and Thru Date, Check Substitute Assignments box, enter your site Location Code, and the employees EmplID.)

TL Time Summary Page
How to Run the Cross-Site Account Code Charges Report

This job aid shows you how to run the Cross-Site Account Code Charges report. This report is for sites to monitor time that is being charged to them by another site. This report should be run regularly during the month and one last time prior to the payroll deadline. If there are charges being made against your department that shouldn’t be, contact the site charging and correct the entries prior to the payroll deadline. The final document for the payroll deadline must be signed and filed with the payroll records.

1. Navigate to: Main Menu > Time and Labor > Reports > Cross-Site Account Charges

2. Click the Add a New Value Tab

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)

4. Click the Add button.

5. In the Department field enter your 4-digit department number, or click the search icon and select your department number.

6. Enter the From Date and Thru Date for the report you are running. Run report regularly during the month.

7. Run report with default Sort Order option selected.

8. Click Save. (Only the first time you are setting up your report)

9. Click Run.

10. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.

11. Click OK.

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How to Run the Cross-Site Account Code Charges Report

12. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

13. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, hit the Refresh button until they change to the correct status.)

14. Click the Details link.

15. Click the View Log/Trace link. This will bring you to a page that shows you three files.

16. Of the three files, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 12. The report will open in Adobe Acrobat Reader. You can now View, Print or Save the report.

NOTE: This report is an official audit record. The administrator must review and sign this document to validate the payroll.
How to Run the Cross-Site Account Code Charges Report to Excel

This job aid shows you how to run the Cross-Site Account Code Charges Report to Excel.

1. Navigate to: Main Menu > Time and Labor > Reports > Cross-Site Account Charges

2. Click the Add a New Value Tab

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)

4. Click the Add button.

5. In the Department field enter your 4-digit department number, or click the icon and select your department number.

6. Enter the From Date and Thru Date for the report you are running.

7. Select XLS/CSV from the Sort Order drop-down menu.

8. Click Save. (Only the first time you are setting up your report)

9. Click Run.

10. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.

11. Select CSV from the Format drop-down menu. You only need to do this the first time you are setting up your report.

12. Click OK.

Oct 2014
13. After you click OK, you will be given a **Process Instance Number** and returned to the Report Page. Click the Process Monitor link to view the status of the report.

14. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, click the Refresh button until they change to the correct status.)

15. Click the Details link.

16. Click the View Log/Trace link. This will bring you to a page that shows you three files.

17. Of the three files, choose the one with the .csv extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 13. You have the option to Open, Save or Save As in Microsoft Excel.
How to Run the Site Account Code Charges Report

This job aid shows you how to run the Site Account Code Charges report. This report is for sites to monitor time that you charged to another site. This report should be run regularly during the month and one last time prior to the payroll deadline. Make sure your site is not charging another site in error. Any errors should be corrected by the timekeeper prior to the payroll deadline. The final document for the payroll deadline must be signed and filed with the payroll records.

1. Navigate to: Main Menu > Time and Labor > Reports > Site Account Charges

2. Click the Add a New Value Tab

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)

4. Click the Add button.

5. In the Group ID field enter your Salary or Hourly Group ID, or click the and select your Group ID. Run one report for Salary and one for Hourly.

6. Enter the From Date and Thru Date for the report you are running. Run report regularly during the month.

7. Click Save. (Only the first time you are setting up your report)

8. Click Run.

9. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.

10. Click OK.
11. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

12. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, hit the Refresh button until they change to the correct status.)

13. Click the Details link.

14. Click the View Log/Trace link. This will bring you to a page that shows you three files.

15. Of the three files, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 11. The report will open in Adobe Acrobat Reader. You can now View, Print or Save the report.

NOTE: This report is an official audit record. The administrator must review and sign this document to validate the payroll.
How to Run the Site Account Code Charges Report to Excel

This job aid shows you how to run the Site Account Code Charges Report to Excel.

1. Navigate to: Main Menu > Time and Labor > Reports > Site Account Charges
2. Click the Add a New Value Tab
3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. (See screenshot example)
4. Click the Add button.
5. In the Group ID field enter your 4-digit department number followed by an “S” for Salary or an “H” for Hourly, or click the icon and select your Group ID.
6. Enter the From Date and Thru Date for the report you are running.
7. Select the Output CSV File check box.
8. Click Save. (Only the first time you are setting up your report)
9. Click Run.
10. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.
11. Select CSV from the Format drop-down menu. You only need to do this the first time you are setting up your report.
12. Click OK.

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13. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

14. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, click the Refresh button until they change to the correct status.)

15. Click the Details link.

16. Click the View Log/Trace link. This will bring you to a page that shows you three files.

17. Of the three files, choose the one with the .csv extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 13. You have the option to Open, Save or Save As in Microsoft Excel.
How to Run a Leave Balance Report

1. Navigate to the Leave Balance Reports page within the Benefits area. Click Main Menu > Benefits > Manage Leave Accruals > Leave Balance Reports

2. Click the Add a New Value tab.

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. As an example, we entered the Run Control ID as Leave_Balance_Reports.

4. Click the Add button.

5. In the Department field, enter your sites 4 digit Department Number.

6. Click Save. (Only the first time you are setting up your report template.)

7. Click the Run button.

NOTE: The next time you run a report you will use the default Find an Existing Value to search for your report. Do not click the Add a New Value tab unless you are setting up a new report template. Once you set up a template, you cannot delete it.
How to Run a Leave Balance Report

8. Select PSNT as the Server Name from the drop-down menu. You only need to do this the first time you are setting up your report.

9. Select either the option Leave Information by Dept or Vacation Balances of 300 or >. For this example we selected Vacation Balances of 300 or >.

10. Click the OK button.

11. After you clicked OK, you will be given a Process Instance Number and returned to the Report Screen. Click the Process Monitor hyperlink to view the status of the report.

12. Your report is done processing when the Run Status reads “Success” and the Distribution Status reads “Posted” (If not, click the Refresh button, wait a few seconds, about 8-10, click the Refresh button again until they change to the correct status.)

13. Click the Details hyperlink. This will take you to the Process Detail page.
14. Click the View Log/Trace hyperlink. This will bring you to the View Log/Trace page that shows you the file list.

15. Of the three files shown under File List, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to your report in step 11. The report will open in Adobe Acrobat Reader. (See example below) You can now view, print or save your report.

**NOTE:** If there is no .PDF file, that means no one at your site has over 300 hours for the current month.

16. Vacation Balances 300 or More Report Sample

```
<table>
<thead>
<tr>
<th>Employee</th>
<th>Plan Type</th>
<th>Accrual Date</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe, Chris</td>
<td>Vacation</td>
<td>07/12/2012</td>
<td>276.90</td>
</tr>
<tr>
<td>Smith, John</td>
<td>Vacation</td>
<td>08/12/2012</td>
<td>330.45</td>
</tr>
<tr>
<td>Doe, Chris</td>
<td>Vacation</td>
<td>07/15/2013</td>
<td>311.50</td>
</tr>
</tbody>
</table>
```

March 2016
Payroll Deadlines

The pay period is a calendar month. The salary earned is for the calendar month. Our first payroll occurs on the last working day of the month. **We pay salaried time on that payroll plus any positive hours reported for staff (both salaried and hourly) that is submitted that month.** The payroll department asks that you have all absences up to the 15th of the month and positive time for the 1st - 15th reported by the 16th. Please do not wait until the 15th or 16th to enter that month's time as it can slow the system down or if you, the timekeeper, are absent you would not be able to meet the deadline. The payroll department sends out an email on the Time and Labor listserv around the 10th of each month informing the timekeeper of that month's deadline for payroll. Be sure you subscribe to this listserv (see training class job aid "Calling all Time and Labor Users"). Timekeeping Tips are also available on the Payroll website located here. **Timekeeper: Payroll Resources**

**Note:** If you have any time that actually falls past the 15th, it will also be imported for the end of the month. You are not required to post past the 15th for that deadline, but we will not fault you for being so up-to-date with your reporting.

For payroll issued on the 10th of the month, you will have until 5:00 pm on the 1st or 2nd to report time. *This is the deadline for positive time only since we do not look at the absence codes on that special.* The 10th is for Positive Pay only. (There is no problem if they are already reported; they just will not be pulled in until the 18th for the next month end.)

*If the 1st or 2nd falls on a weekend, the deadline will be 5:00 pm on the following Monday. This will give you a little extra time to report when the weekend comes up quickly.*

Records Retention - Signed Reports

The following retention procedure is recommended from the District Auditor's Office. Please retain your payroll records for auditing purposes in the following manner:

- **Payroll records** should be retained in a binder designated as "Site Name" and “Payroll Records" with fiscal year (e.g., Adams Elementary, Payroll Records, July 2016 - June 2017). A separate binder should be used for each fiscal year. Payroll records are required to be kept for four years. Beginning the fifth year, only the year-one payroll records for the completed proceeding four years can be destroyed. Grants and other programs may require a longer retention period. Contact the program office or read the grant requirements to determine length of record retention.

- **Organization of records:**
  - Principal/Administrator signed copies of the **Audit Paid to Reported Time Report** along with the **Filled Position Report, Monthly Payroll Checklist for Managers**, in a binder chronologically.
  - The **Timecards** separated by employee, in alphabetical order, in a binder, located in the same file cabinet or file box with reports. Timecards and leave forms must be retained at the site for four years.
  - Principal/Administrator signed copies of the **Cross Site Account Code Charges** and **Site Account Code Charges** reports in separate binders, organized chronologically.

The **timecards/forms** identified as site-retained documentation are available on the **Payroll website**. Use paper copies (8 1/2 x 11) for processing and retention in the binder or file.
How to Run the Allocations Status by Assignment Report

1. Navigate to: Main Menu > Workforce Administration > Workforce Reports > Allocations Status by Assignment

2. Click the Add a New Value tab. (Only the first time you are setting up the report.)

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use ( _ ) as a separator.

4. Click the Add button.

5. Effective Date. Defaults to current date. Enter a different date if you would like to see past or future allocations for your department.

6. Enter your Department Number, or click the to view a list of departments from which to choose.

7. There are run control options for report selection and sorting criteria. For this example we will run by Resource, Department, Job Code.

   NOTE: For a description of each option see box below screen shot.

8. Click Save. (Only the first time you are setting up your report.)

9. Click the Run button.

10. Select PSNT from the drop-down menu for Server Name.

11. Click the OK button.

Allocations Status by Assignment report will show only those position numbers (and incumbents) where the department on the run control matches the department on the employee’s assignment (Job Data). For each position the report will show all funding sources (100%).

Options for report selection and sorting criteria are:

- Ability to run report by one, many or range of resources. To run for one resource, enter the same resource in the “Resource From” and “Resource To” fields. To run for several resources, click the button to add another resource or range of resources. Repeat as needed. To run for a range of resources, enter the first desired resource of the range in the “Resource From” field and the last desired resource in the range in the “Resource To” field. The resources you selected will be shown in the center of the report header; if more resources were selected than can be displayed in the report header due to space limitations, the last resource shown will be followed by “…,” to indicate the report includes additional resources.

- Ability to sort report by Department, Resource, JobCode OR by JobCode OR by Resource, Department, JobCode

- At least one of the following criteria must be entered: Department, Resource or Job Code
### How to Run the Allocations Status by Assignment Report

1. **Click the `Refresh` button to update the Run Status.**

2. **When Run Status becomes “Success” and Distribution Status becomes “Posted”, click the Details link.**

3. **Click the View Log/Trace link.**

4. **Click the .PDF link that contains the Process Instance number that you noted above. (Step 12)**

5. **Click the View Log/Trace link.**

6. **Your report will open in Adobe Acrobat Reader. Example shown below is the Allocations Status by Assignment, sorted by Resource, Department, Job Code. A Salaried Position Summary by Resource appears at the end of all salaried positions and before hourly positions are shown.**

---

#### Sample Report

<table>
<thead>
<tr>
<th>Resource</th>
<th>Department</th>
<th>Job Code</th>
<th>Status</th>
<th>Class</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How to Run the Allocations Status by Funding Report

1. Navigate to: Main Menu > Workforce Administration > Workforce Reports > Allocations Status by Funding

2. Click the Add a New Value tab. (Only the first time you are setting up the report.)

3. Enter a Run Control ID. Name the report something unique that you will remember. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use ( _) as a separator.

4. Click the Add button.

5. Effective Date. Defaults to current date. Enter a different date if you would like to see past or future allocations for your department.

6. Enter your Department Number, or click the button to view a list of departments from which to choose.

7. There are run control options for report selection and sorting criteria. For this example we will run by Job Code.

   NOTE: For a description of each option see box below screen shot.

8. Click Save. (Only the first time you are setting up the report.)

9. Click the Run button.

Allocation Status by Funding report will show only those positions (and incumbents) where the department on the run control matches the department of some or all funding sources on the position, regardless of the department on the employee’s assignment (Job Data). For each position, only the funding sources that have the same department as the run control department will be shown.

Options for report selection and sorting criteria are:

- Ability to run report by one, many or range of resources. To run for one resource, enter the same resource in the “Resource From” and “Resource To” fields. To run for several resources, click the button to add another resource or range of resources. Repeat as needed. To run for a range of resources, enter the first desired resource of the range in the “Resource From” field and the last desired resource in the range in the “Resource To” field. The resources you selected will be shown in the center of the report header; if more resources were selected than can be displayed in the report header due to space limitations, the last resource shown will be followed by “…” to indicate the report includes additional resources.

- Ability to sort report by Department, Resource, JobCode OR by JobCode OR by Resource, Department, JobCode

- At least one of the following criteria must be entered: Department, Resource or Job Code

10. Select PSNT from the drop-down menu for Server Name.

11. Click the OK button.
How to Run the Allocations Status by Funding Report

12. Note your Process Instance number and click the Process Monitor link.

13. Click the Refresh button to update the Run Status.

14. When Run Status becomes “Success” and Distribution Status becomes “Posted”, click the Details link.

15. Click the View Log/Trace link.

16. Click the .PDF link that contains the Process Instance number that you noted above. (Step 12)

17. Your report will open in Adobe Acrobat Reader. Example shown below is the Allocation Status by Funding, sorted by Job Code. A Salaried Position Summary by Resource appears at the end of all salaried positions and before hourly positions are shown.
**Allocations Status Report Example**

<table>
<thead>
<tr>
<th>Type</th>
<th>Job Code Description</th>
<th>FTE/Head Cnt</th>
<th>Allocated</th>
<th>HCM Account Code</th>
<th>Recru, Bud, Acct, Prog, Class, Fund, Ext</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sgly A</td>
<td>20007149 0095A 4485 Spec Ed Assst</td>
<td>ID Rcd FTE Status</td>
<td>0.7500 0.7500 0.0000 0.7500 100.0% 0095650032102112214262 65000 00 2101 1110 5170 0100 4262</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sgly A</td>
<td>20003763 0095A 4620 Spec Ed Assst</td>
<td>ID Rcd FTE Status</td>
<td>0.7500 0.7500 0.0000 0.7500 100.0% 009565007002126</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sgly A</td>
<td>200180708 0095A 2025 Teacher-Bilingual Education</td>
<td>ID Rcd FTE Status</td>
<td>0.7500 0.0000 -0.7500 0.0000 75.0% 00957090000001070102010800 70900 00 1107 1000 1110 0100 0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employee associated with position
ID, Rcd, FTE, Status, Name, Class Indc

**A Salaried Position Summary by Resource** appears at the end of all salaried positions and before hourly positions are shown.

At the end of the Hourly section, the report will show a **Grand Total** of the FTE columns Used, Allocated and Balance.

Report is sorted by Salaried and Hourly positions
How to Run the Filled Positions Report

1. Navigate to: **Main Menu > Workforce Administration > Workforce Reports > Filled Positions**

2. Click the **Add a New Value** tab. (Only the first time you are setting up the report.)

3. Enter a **Run Control ID**. Name the report something unique that you will remember. You only need one **Run Control ID** for this report. There should be no spaces in the **Run Control ID**. Use ( _ ) as a separator.

4. Click the **Add** button.

5. If you want to run the report by **Department**, (like the example) click **For Central Office Use** radio button. In this case there are two options for running the report. You can select only one at a time. For a detailed description of each option see box below screen shot.

If you want to run the report by **Location**, click **For Site Use** radio button. In this case the report will show all employees whose location matches that on the run control. The report will show all funding sources for these employees.

6. Enter a **Location/Department**, or click the icon to view a list of **Locations/Departments** from which to choose.

7. Click **Save**. (Only the first time you are setting up your report.)

8. Click the **Run** button.

**NOTE:** The system does not allow for both **Location/Department** and **Job Code**, but if you want to see positions for a specific Job Code, enter a Job Code, or click the icon to view a list of Job Codes from which you can choose.

9. Select **PSNT** from the drop-down menu for **Server Name**.

10. Click the **OK** button.
How to Run the Filled Positions Report

11. Note your Process Instance number and click the Process Monitor link.

12. Click the Refresh button to update the Run Status.

13. When Run Status becomes “Success” and Distribution Status becomes “Posted”, click the Details link.

14. Click the View Log/Trace link.

15. Click the .PDF link that contains the Process Instance number that you noted above. (Step 11)

16. Your report will open in Adobe Acrobat Reader. The report is sorted by Salaried and Hourly positions, then by employee in alpha order.
The report is sorted by Salaried and Hourly positions, then by employee in alpha order.
Entering a Performance Evaluation Summary into PeopleSoft

Once a performance evaluation is completed for any salaried employee, classified or certificated, the manager or evaluator enters the outcome of the evaluation into PeopleSoft as shown below.

1. In PeopleSoft HCM navigate to:

   Workforce Development > Performance Management > Performance Eval Tracking

2. Click Add a New Value

3. Enter the Empl ID of the employee who was evaluated, and the Evaluation Date on which the performance evaluation was conducted. Click Add.
Entering a Performance Evaluation Summary into PeopleSoft

4. The Performance Evaluation Tracking page displays the salaried assignment(s) of the employee at the time the evaluation was conducted. Click the magnifying glass beside the Performance Evaluation Form field to select the evaluation form that was used to evaluate the employee.

5. If the evaluation was unscheduled (classified) or a special evaluation (certificated), select the checkbox. (If not, leave it blank.) Then select the overall performance rating. These fields will change depending on which performance evaluation form was selected in Step 4 above.

Sample Classified Evaluation Form:
6. In the **Evaluator Supervisor/Rater** field, enter the employee ID of the person who evaluated or rated the employee. To search for the employee ID by name, click the magnifying glass beside the **Evaluator Supervisor/Rater** field, then click **Advanced Lookup** and type the last name of the evaluator. The evaluator's name, job code, and job title as of the Evaluation Date appears.

7. Click **Save**. The employee ID and name of the last person to save the record appears at the bottom right, with the date and time the record was last saved.

*The entry of the Performance Evaluation Summary is now complete*
How to Run the Certificated Evaluations Report

This job aid will show you how to run the Certificated Evaluations Report.

1. Navigate to: Main Menu > Workforce Administration > Workforce Reports > Certificated Evaluations

2. Click the Add a New Value Tab

3. Enter a Run Control ID. You only need one Run Control ID for this report. There should be no spaces in the Run Control ID. Use (_) as a separator. Name the report Employee_Evaluations (See screenshot example)

   **NOTE:** This same report name is used for the Classified Evaluations Report. You do not need to set up another report.

4. Click the Add button.

   **NOTE:** You only need to click the Add a New Value tab the first time you run a report. The next time you run a report, just click the search button. It will bring up the Run Control ID you have created. Click the appropriate link.

5. Enter the Run Date. Enter September 1 of the current school year. (ex: 09/01/2015)

6. Enter your Department, or click the to view a list of departments from which to choose.

7. Click Run.

8. Click Save.

9. Select PSNT from the Server Name drop-down menu. You only need to do this the first time you are setting up your report.

10. Click OK.

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How to Run the Certificated Evaluations Report

11. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

12. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, hit the Refresh button until they change to the correct status.)

13. Click the Details link.

14. Click the View Log/Trace link. This will bring you to a page that shows you three files.

15. Of the three files, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 11.
How to Run the Certificated Evaluations Report

The report opens in Adobe Acrobat Reader. (See sample report below) You can now view, print or save your report.

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Name</th>
<th>Job Code/Title</th>
<th>Previous Location</th>
<th>Class/Cert</th>
<th>Eval Type</th>
<th>Last Eval Dt</th>
<th>Eval Form</th>
<th>Special Eval</th>
<th>Skip Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe</td>
<td>Chris</td>
<td>Teacher</td>
<td>C</td>
<td>Regular</td>
<td>Bi-Annual</td>
<td>06/22/2014</td>
<td></td>
<td>X</td>
<td>X</td>
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</table>

Report Field Definitions:

- **EmplID** - Employee ID Number
- **Name** - Employee Name
- **Job Code/Title** - Employee’s Job Code and Job Title
- **Previous Location** - Employee’s location at end of previous school year if different from current location
- **Class/Cert** - Employee’s Job Classification, C for Certificated, Months Worked, T for Traditional or Y for Year-Round, JS for Job Share (if applicable)
- **Union** - Employee’s union affiliation
- **EE Class** - PER - Permanent, PR1 - Probationary 1st year, PR2 - Probationary 2nd year, LVR - Leave Replacement
- **Eval Type** - Annual or Bi-Annual
- **Last Eval Dt** - Employee’s last evaluation date, provided that information was entered into the Performance Eval Tracking page in PeopleSoft. If the evaluation was not entered into PeopleSoft, the last evaluation date will not show on the report. The Performance Eval Tracking page is available from the HR Manager Dashboard or can be accessed at Workforce Development > Performance Management > Performance Eval Tracking. See the Entering a Performance Evaluation Summary in PeopleSoft job aid.
- **Eval Form** - Evaluation form used for the employee’s last evaluation will show provided the evaluation was entered into the PeopleSoft Performance Eval Tracking page as described above.
- **Special Eval** - If the employee’s last evaluation was a special evaluation, it will show provided the evaluation was entered into the PeopleSoft Performance Eval Tracking page as described above.
- **Skip Year** - If employee’s last evaluation was a skip year (the evaluation was due but skipped), it will show provided the evaluation was entered into the PeopleSoft Performance Eval Tracking page as described above.
How to Run the Classified Evaluations Report

This job aid will show you how to run the Classified Evaluations Report.

1. Navigate to: Main Menu > Workforce Administration > Workforce Reports > Classified Evaluations
2. Click the Search button.
3. This will bring up your report screen.

**NOTE:** This same report will be used for the Certificated Evaluations Report.

4. Enter the Run Date. Evals are produced for the month following the run month. (ex: 02/01/2015)
5. Enter your Location Code, or click the to view a list of locations from which to choose.
6. Enter L for Classified, F for Food Services or leave blank for all combined.
7. Click Run.
8. Select PSNT from the Server Name drop-down menu.
9. Click OK.
How to Run the Classified Evaluations Report

10. After you click OK, you will be given a Process Instance Number and returned to the Report Page. Click the Process Monitor link to view the status of the report.

11. Your report is done processing when the Run Status reads “Success” and Distribution Status reads “Posted” (If not, hit the Refresh button until they change to the correct status.)

12. Click the Details link.

13. Click the View Log/Trace link. This will bring you to a page that shows you three files.

14. Of the three files, choose the one with the .PDF extension. The name of the report will also contain the Process Instance Number that was assigned to it in step 10.
How to Run the Classified Evaluations Report

The report opens in Adobe Acrobat Reader. (See sample report below) You can now view, print or save your report.

**Report Field Definitions:**

- **EmpID** - Employee ID Number
- **Name** - Employee Name
- **Due Date** - Date evaluation is due
- **Job Code/Title** - Employee’s Job Code and Job Title
- **Previous Location** - Employee’s location at end of previous school year if different from current location
- **Class/Cert** - Employee’s Job Classification, L for Classified, Months Worked, T for Traditional, Y for Year-Round or MODIF for Modified Work Year
- **Months Worked** - 10, 11, or 12
- **Union** -
  - 02 = OSS
  - 03 = OTBS
  - 04 = POA
  - 05 = PARA
  - 06 = SPVR (non-represented supervisors)
  - L6 = SPVR (represented classified supervisors)
  - 08 = CONFID
- **EE Class** -
  - DCH = District Charter
  - PER = Permanent
  - PPB = Perm/Prob (Class)
  - PR1 = Probationary 1 (first yr Prob)
  - PR2 = Probationary 2 (2nd yr Prob)
  - PRO = Probationary Classified
- **Eval Type** - Annual or Bi-Annual
- **Last Eval Dt** - Employee’s last evaluation date, provided that information was entered into the Performance Eval Tracking page in PeopleSoft. If the evaluation was not entered into PeopleSoft, the last evaluation date will not show on the report. The Performance Eval Tracking page is available from the HR Manager Dashboard or can be accessed at Workforce Development > Performance Management > Performance Eval Tracking

See the [Entering a Performance Evaluation Summary in PeopleSoft](#) job aid.