



CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

Updating Job Information

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

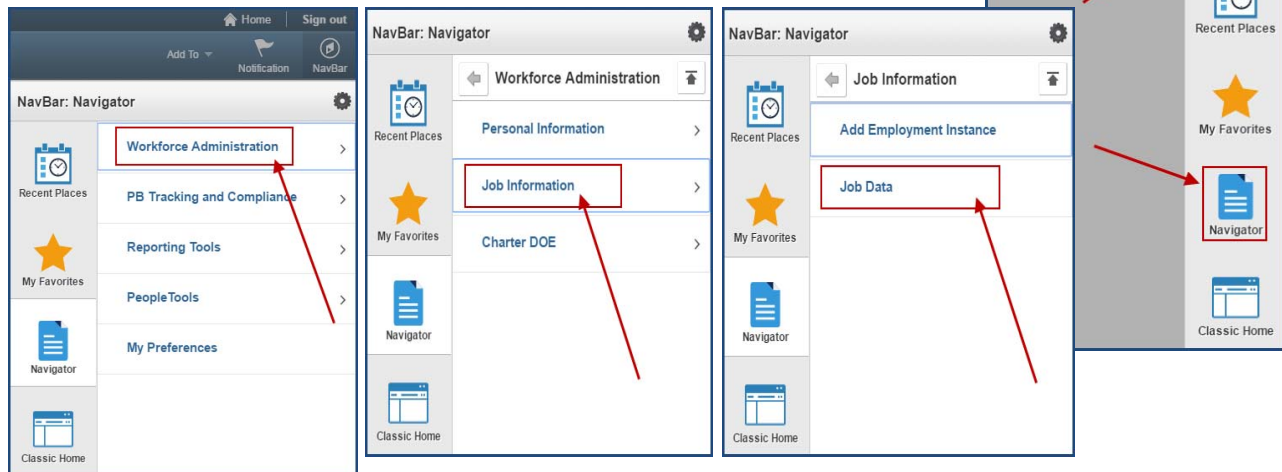
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How to Update an Employee's Job Information

All job information changes are made to the employee's current job record. When updating the job information, always be sure to choose the correct **Action/Reason** and to update all the information on each tab in the **Job Data** screens. Please note: if a salary change is made, you will need to click the **Calculate Compensation** button on the **Compensation** tab before saving.

1. In PeopleSoft, click on the **Human Capital Management** tile.
2. In the next window, click on the **NavBar** icon to bring up the **NavBar** menu.
 - A. Click on the **Navigator** icon to bring up the **Navigator Menu**.
 - B. Click on **Workforce Administration**
 - C. Click on **Job Information**
 - D. Click on **Job Data**



The Job Data Search Screen will display.

3. There are three (3) ways to search for an employee:
 - A. Enter the **Employee ID** in the **Empl ID** field, or
 - B. Enter the **last name, first** in the **Name** field, or
 - C. Enter the **last name, only**, in the **Last Name** field.
4. Click the **Include History** box.
5. Click the **Search** button.

A screenshot of the "Job Data" search screen. At the top, it says "Job Data" and "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this are two buttons: "Find an Existing Value" and "Keyword Search". A "Search Criteria" section contains several fields: "Empl ID" (dropdown: begins with), "Empl Record" (dropdown: =), "Name" (dropdown: begins with), "Last Name" (dropdown: begins with), "Second Last Name" (dropdown: begins with), "Alternate Character Name" (dropdown: begins with), and "Middle Name" (dropdown: begins with). There are three checkboxes: "Include History" (checked), "Correct History", and "Case Sensitive". At the bottom are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". Red boxes highlight the "Include History" checkbox and the "Search" button.

The Employee's **Job Data** screen will appear.

Teacher, Tommy
Employee
Empl ID 1234567
Empl Record 0

Work Location ? Find First 1 of 5 Last

*Effective Date 04/05/2018 Go To Row + -

Effective Sequence 0 *Action Position Change

HR Status Active Reason New Position

Payroll Status Active *Job Indicator Primary Job

Position Number [] Override Position Data Addl Pay

Position Entry Date [] Position Management Record

*Regulatory Region USA United States

Company CHT Palm Beach Charter Schools

*Business Unit SDPBC School Dist of Palm Beach Co

*Department 1234 Anytown Charter High School

Department Entry Date 08/11/2015

*Location 1234 Anytown Charter High School

Establishment ID SDPBC School Dist Of Palm Beach Co Date Created 04/05/2018

Last Start Date 08/11/2015

Expected Job End Date [] End Job Automatically

Job Data Employment Data Earnings Distribution Benefits Program Participation

1. On the **Work Location** section, click on the **plus sign (+)** button to add a new row.
2. Enter the **Effective Date** of the new information to be entered.
3. In the **Action** and **Reason** fields, select the appropriate **Action and Reason**.
4. Click the **Job Information** tab to go to the **Job Information** page.
5. If changing positions, click on the **magnifying glass** button to select the appropriate job code.
6. Update the **Standard hours, Work period** and **FTE** fields, if needed.
7. Update the **Job Labor, Payroll, Salary Plan** and **Compensation** Tabs, if needed.
8. Click the **Save** button at the bottom of the page..

Teacher, Tommy
Employee
Empl ID 1234567
Empl Record 0

Job Information ? Find First 1 of 5 Last

Effective Date 04/05/2018 Go To Row

Effective Sequence 0 Action Position Change

HR Status Active Reason New Position

Payroll Status Active Job Indicator Primary Job

*Job Code 54350 Tch Sec Gifted English

Entry Date 04/05/2018

Supervisor Level []

Supervisor ID []

Reports To []

*Regular/Temporary Regular *Full/Part Full-Time

Empl Class [] *Officer Code Needs Cert for PSC

*Regular Shift Not Applicable Shift Rate []

*Classified Ind Instructional 10 Mth 196 Di Shift Factor []

Standard Hours ?

Standard Hours 40.00 Work Period 196 196 Day

FTE 1.000000

Adds to FTE Actual Count? Encumbrance Override

Contract Number ?

Contract Number [] Next Contract Number Contract Data

Contract Type []

USA

Regular employees = # of Duty Days
Temporary employees = W

How to Terminate an Employee

(or to terminate a Record created in error)

1. On the **Work Location** section, click on the **plus sign (+)** button to add a new row.
2. In the **Effective Date** field, enter the termination date.
(Note: If you are terminating a Record that was created in error and you are using the same date from the prior row, you will need to choose the next number in the Effective Sequence field. Example: If prior Effective Sequence was "0" you'll need to choose "1.")
3. In the **Action** field, click on the **drop down arrow** and select "termination."
4. In the **Reason** field, select the appropriate reason.
(Note: If you are terminating a Record that was created in error, choose "Created Record in Error" for the Reason.)
5. Click the **Save** button at the bottom of the page.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | PB Job Data

Teacher, Tommy | Empl ID 1234567
Employee | Empl Record 0

Work Location ? Find First 1 of 5 Last

*Effective Date 04/05/2018 [calendar icon] + -

Effective Sequence 0

HR Status Inactive

Payroll Status Terminated

*Action Termination

Reason Other Resignation

*Job Indicator Primary Job

Current

Position Number [input] [magnifying glass icon]

Override Position Data Add Pay

Position Entry Date [calendar icon]

Position Management Record

*Regulatory Region USA United States

Company CHT Palm Beach Charter Schools

*Business Unit SDPBC School Dist of Palm Beach Co

*Department 1234 Anytown Charter High School

Department Entry Date 08/11/2015 [calendar icon]

*Location 1234 Anytown Charter High School

Establishment ID SDPBC School Dist Of Palm Beach Co

Date Created 04/05/2018

Last Start Date 08/11/2015 Termination Date 04/04/2018

Expected Job End Date [calendar icon] End Job Automatically

Last Date Worked 04/04/2018 Override Last Date Worked

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

TIP: This is the day after the employee's last day of work.

TIP: Do not select options that begin with "cc."