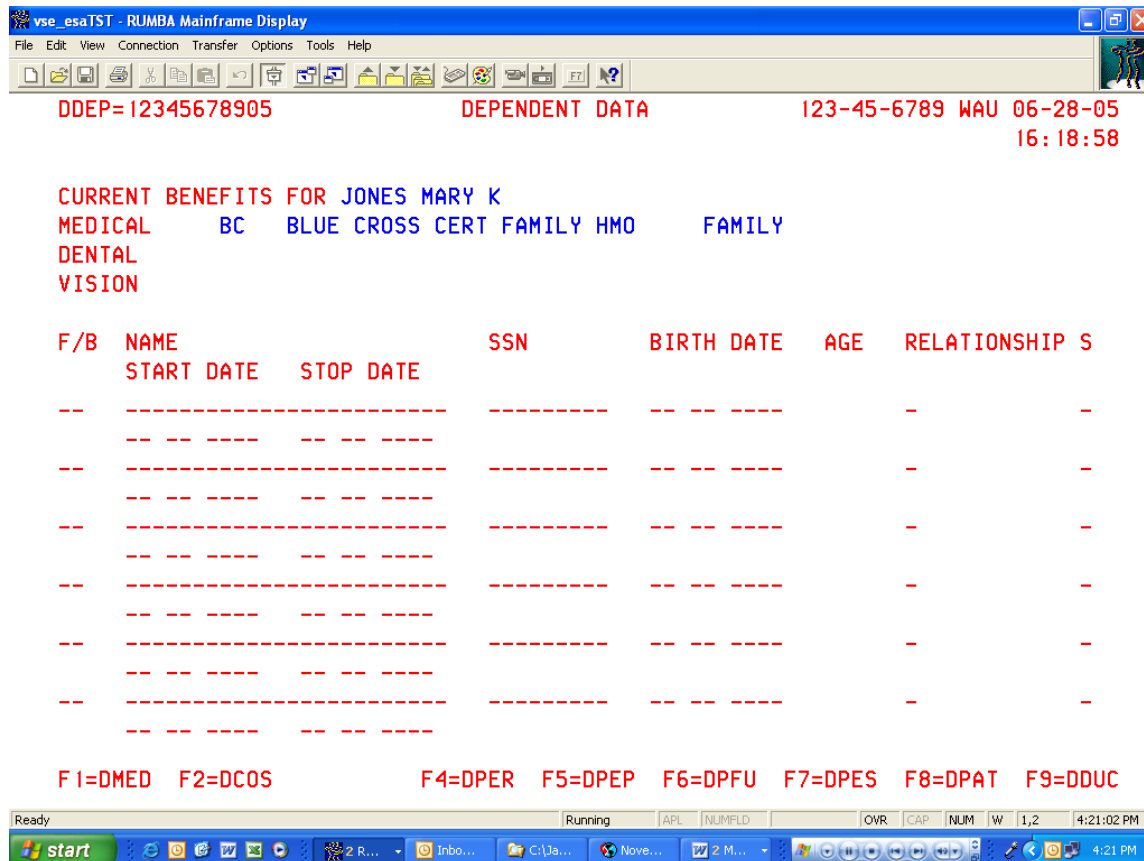


DDEP

Dependent Data



To enter into this screen, type: DDEP=Social Security Number + FY

This screen collects information primarily for OBRA requirements. At this time, only dependents who are covered under your medical plan need to be input on this screen. However, you may input those dependents covered by your dental and vision plans as well. In the heading you will see the first medical, dental and vision fringe benefits that have coverage codes on the DPFU screens.

The employee's benefits as well as the dependents must be input on this screen. This screen should contain history. Whenever a person changes benefits on the DPFU screen, you need to come into the DDEP screen and put a stop date in the old benefit, and put on the new benefit. This screen is not automatically updated from the DPFU screen.

DDEP

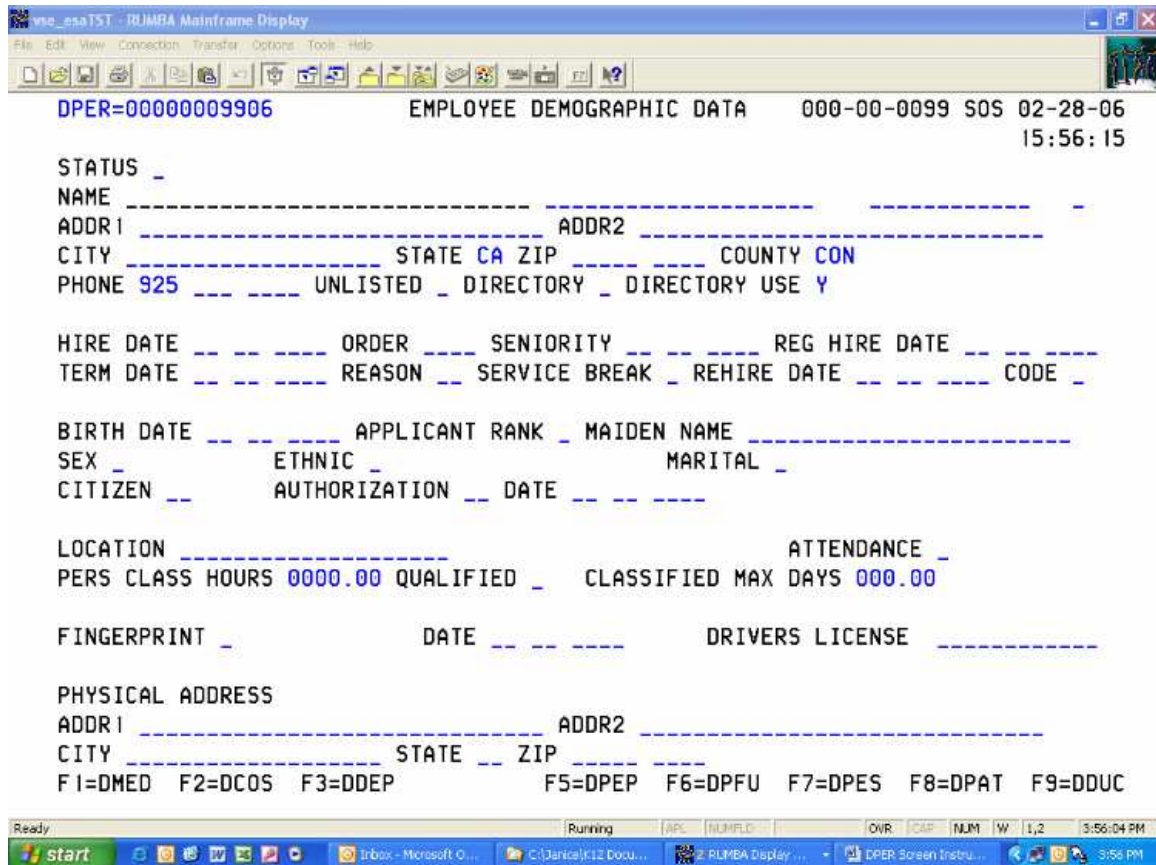
Dependent Data

F/B	Fringe benefit code from the dictionary must have the coverage codes input on the dictionary in order to be entered here.
NAME	Enter name of dependent, last name first.
SSN	Enter the social security number of the dependent. If you do not have social security numbers, enter all nines.
BIRTHDATE	Enter birth date of the dependent in MMDDYY format.
AGE	Age will be computed by the system automatically according to the dependent's birth date.
RELATIONSHIP	Enter the relationship code. I = Individual S = Spouse C = Child E = Elder D = Disabled Child P= Domestic Partner T=Temp Custody/Court Ordered
S	This field is for students. Put a "Y" if the child is a student. Field will default to "N" if left blank.
START DATE	MMDDYY format benefit started.
STOP DATE	MMDDYY format benefit ceased.

DPER PROCEDURES

(Employee Demographic Data Screen)

PURPOSE: Each employee has only one DPER screen. The name and address information in this screen is used by programs in all the system (Personnel/Payroll/Finance).



To enter into this screen, type: DPER=Social Security Number + FY

STATUS	This field describes the current status of the employee. Enter the appropriate code: DICT=PEPSX000 0 (zero) = Active employee I = Inactive employee 1 = Open position
NAME	As of March 19, 2002 it is no longer allowed to input into the first field. Begin by entering last name in the second field, tab to the third field and enter first name, tab to last field and enter middle initial. Hyphenated last names are valid but other punctuation such as O'Shea is not acceptable.

DPER PROCEDURES

(Employee Demographic Data Screen)

ADDRESS 1	Will accept 30 characters of address. If you need more, use the second address line. Don't use period or commas in these lines.
ADDRESS 2	IRS only accepts one address line; if both address lines are filled in on the screen, line two will be the default for W2's.
CITY	Input City.
STATE/ZIP	Input state. Will default to CA if left blank. States are validated against the dictionary. DICT=SYST Input zip code.
COUNTY	Input county. Will default to "CON" for Contra Costa. Other county options may be viewed/validated against DICT=SYCN
PHONE	Input telephone number including area code. Area code will default to 925 but can be changed.
UNLISTED	Optional field. Input "U" if employee's phone number is not to be listed in staff directory.
DIRECTORY	This field is used in conjunction with directory to limit information printed on PL66 report. Enter: I = Print internal only; N = Print name only or P = Print all employee data
DIRECTORY USE	Input "Y" if employee wants name and address to appear in staff directory. Otherwise enter "N". If field is left blank it will default to a "Y".
HIRE DATE	Input the date employee was first hired in month/day/year format.
ORDER	Required only if two or more employees are hired on the same date, with the same job title code. Must be numeric and is not validated against a dictionary.
SENIORITY	Input the date on which the employee's district seniority will be determined. MMDDYY format. This field is used if seniority date and start date are different. If the field is left blank the system will assume that the seniority date is the same as the hire date.
REG HIRE DATE	Input the date employee became entitled to continuing employment with the district.
TERM DATE	Input official termination date in MMDDYY format. If you input a date in this field you must also input information in the "Reason" field.
REASON	Input termination reason code. Valid reason codes may be found in dictionary. DICT=PETC
SERVICE BREAK	Enter "Y" if service break has occurred. Optional field.
REHIRE DATE	Input eligible date in MMDDYY format.
CODE (REHIRE)	Information field, user defined. This is a free form field in that input here will not be validated by program.
BIRTHDATE	Input in MMDDYY format.

DPER PROCEDURES

(Employee Demographic Data Screen)

APPLICANT RANK	Future use.
MAIDEN NAME	Input former last name only.
SEX	Input M = Male or F = Female
ETHNIC CODE	Input one of the following: 1 = Asian/Pacific Islander 2 = American Indian/Alaskan native 3 = Black – non Hispanic 4 = Hispanic 5 = White – non Hispanic 6 = Filipino 7 = Refused to indicate DICT=SYEC
MARITAL	Input marital status code. Input into this field will be validated by the dictionary. D = divorced L = separated M = married N – refused to indicate O = unknown S = single W = widowed X = unknown DICT=SYMS
CITIZENSHIP	Input US or appropriate country. Validated against dictionary, DICT = SYCC
AUTHORIZATION	Free form two character field. Use to record fact employee has green card.
AUTHORIZATION DATE	Authorization Date field to trace Resident Aliens; the date is not required, but if it is used, the date must be a valid date.
LOCATION	Free form field. Enter up to 20 characters in this field. Consistency in the use of this field should be followed by all users. Ex. District Office, D.O. or Dist Office may be used to report the location of the employee but only one format should be used.
ATTENDANCE	Input H = hourly or D = daily. Input the appropriate letter that describes how the employee's attendance will be maintained.
PERS CLASS HOURS	Non-input field. This field accumulates classified "no pension" hours (updated from the payroll system) for qualifying into retirement system. This field is cleared each fiscal year after the July 10 th payroll.

DPER PROCEDURES

(Employee Demographic Data Screen)

QUALIFIED	Informational only field. Reports if employee's accumulated hours have qualified them for membership into PERS retirement. Q = qualified Blank = not qualified if PERS CLASS HOURS field is populated.
CLASSIFIED MAX DAYS	Future use.
FINGERPRINT	Input "Y" for fingerprints on file or "N" for no fingerprints on file.
FINGERPRINT DATE	Date field to trace fingerprint clearances; the date is not required but it must be a valid date if the field is used. This date cannot be a future date.
DRIVER'S LICENSE	Free form field. May enter up to 12 characters.
PHYSICAL ADDRESS 1	Enter physical address if different than address entered above.
PHYSICAL ADDRESS 2	Self explanatory
CITY	Self explanatory
STATE	Self explanatory
ZIP CODE	Self explanatory

DMED PROCEDURES

Health Data Emergency and Medical Information

PURPOSE: This screen has the emergency and medical information fields plus fields for certificates and vaccinations.

To enter into this screen, type: DMED=Social Security Number + FY

The screenshot shows a window titled "Test - RUMBA Mainframe Display". The menu bar includes File, Edit, View, Connection, Transfer, Options, Tools, and Help. The toolbar contains various icons for file operations and system functions. The main display area shows the following text:

```
DMED=00000001704          HEALTH DATA          000-00-0017 WAU 10-29-03
                                                                14:27:12
```

NAME TEST MARY M
TB TEST DUE __ __ ____ OPTION Y PRINT ON CHECK TEST TYPE _ EXEMPT _
NEXT PHYSICAL DUE __ __ ____
CERTIFICATES HEPATITUS B VAC1 __ __ ____
CPR __ __ ____ VAC2 __ __ ____
FIRST AID __ __ ____ VAC3 __ __ ____
OTHER __ __ ____

HANDICAPPED _
SPECIAL MEDICAL PROBLEMS _____

EMERGENCY INFORMATION RELATIONSHIP
NAME1 _____ PHONE __ __ ____ _____
NAME2 _____ PHONE __ __ ____ _____

PHYSICIAN HOSPITAL _____
PERSONAL DR _____ PHONE __ __ ____
DESIGNATED DR _____ PHONE __ __ ____

F2=DCOS F3=DDEP F4=DPER F5=DPEP F6=DPFU F7=DPES F8=DPAT F9=DDUC

Ready Running APL NUMFLD OVR CAP NUM W 1,2 2:38:19 PM

NAME This field automatically populate from the information supplied on the DPER screen.

TB TEST DUE Input in MMDDYY format

OPTION This field allows user to decide if TB due date should print on check. Enter "Y" to print on check or "N" to not print on check.

TEST TYPE Input: X = X-ray or S = Skin

EXEMPT Input: Y = exempt. Blank = not exempt

DMED PROCEDURES

Health Data Emergency and Medical Information

HEPTATITUS B VAC 1,2 AND 3	Input date vaccination received in MMDDYY format.
CPR	Input date certificate valid in MMDDYY format.
FIRST AID	Input date certificate valid in MMDDYY format.
OTHER	Not in use at this time.
HANDICAPPED	Leave blank if employee is not handicapped or enter appropriate code located in dictionary. DICT=PEHC
SPECIAL MEDICAL PROBLEMS	Free form field that will accept up to 30 characters.
EMERGENCY INFORMATION-NAME 1	Input contact person by last name, first name and then middle initial.
PHONE	Input telephone number including area code.
RELATIONSHIP	Input relationship to employee.
EMERGENCY INFORMATION-NAME 2	Input contact person by last name, first name and then middle initial.
PHONE	Input telephone number, including area code.
RELATIONSHIP	Input relationship to employee.
HOSPITAL	Input name of hospital.
PERSONAL DR	Input last name of employee's personal physician.
PHONE	Input hospital/physician's phone number, including area code.
DESIGNATED DR	Input last name of employee's worker's compensation doctor.
PHONE	Input phone number, including area code.

DPFU PROCEDURES

Fringe Benefit Update Screen Salary Related Statutory and Fringe Benefits

EMPLOYER AMNT/PCT	This represents the dollar or percentage amount that the employer contributes each pay period. This field will be supplied if it is present on the 02 record of the fringe benefit dictionary.
START DATE	Input the date in MMDDYYYY format, on which the employee began participating in this fringe benefit. NOTE: This date must always be the first day of the month for which the benefit is to be paid.
STOP DATE	Input the date in MMDDYYYY format, which the employee terminated participation in this fringe benefit. NOTE: This date must always be the last day of the month for which the benefit is to be paid. If this a continuing fringe benefit, leave this field blank.
REFERENCE NUMBER	This is a user defined field to input comments about this particular fringe benefit. For example; if this fringe benefit has a deductible associated with it, the deductible amount could be input here.
DI	This is the deletion indicator field. This field indicates whether a benefit with a stop date should be deleted at fiscal year end rollover. Y = Deleted benefit on rollover, N = Retain benefit on rollover.
25	This field displays if a benefit code has been set up for the 125 options of premium, flex or cash plans.
DESCRIPTION/ERR	No input is necessary. This field is the long description of the fringe benefit code as described on the dictionary record.

DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

NOTE:

For non Position Control Districts:

Fields followed by ** or *** will come from the Job Title Dictionary Record if present and can be changed on the DPEP record (screen).

For Position Control Districts:

Fields followed by * are brought forward from the position control record (screen). They are only brought forward when a new employment record is added and may be changed on the employment record at any time.

Fields followed by ** are brought forward from the position control record (screen). They are filled in from the corresponding position control screen every time the employment record is brought to the screen and may not be changed.

ACTION	Defaults "A" for a new screen, "C" for a screen that is already there, and enter "P" to page to the next screen. To edit this screen you must have a "C" in the action field.
SITE	This field does not allow manual entry. Once the first account number is placed on the DPEP screen under PCT DISTRIBUTION this field will display the school dictionary description as the site code.
POSITION CONTROL **	Automatically entered by the system from the transaction input line. Not available for entry.
CODE	Employment code: Gives the current status of the employment record. B = current active. Other codes available can be validated against the dictionary (DICT=PEECX000)
JOB TITLE **	Input Job title. Use title "OZ" for retirement records. Job titles can be found in the dictionary and are validated in this field. See DICT=PCPPX00)
JOB CLASS **	Input classification code. Job classifications can be found in the dictionary and are validated in this field. See DICT=PEJCXX00
APPT TYPE	Appointment type: F = full time or P = other than full time
POSN TYP	Position type: Input one primary DPEP screen as a "P". All other records/screens should be coded "S" for secondary.
LEAVE	Leave status: A = currently active. Leave status codes can be found in the dictionary and are validated in this field. See DICT=PELSX000
UNION **	Input code of union/bargaining unit. Codes can be found in the dictionary and are validated in this field. See DICT=PEUCXX00
EEO **	Equal Employment Opportunity code. Defaults to "98" if not input. Codes are validated against the dictionary. See DICT=PEE5XX00

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

FTE	Full time equivalent. Input employee's full time equivalency or percentage of time worked.
F/B IND	Fringe benefit indicator. Y = yes, to distribute fringe benefits against these accounts. N = no, do not distribute fringe benefits against these accounts.
PENSION TYPE	Input Pension type. Codes are validated against the dictionary. See DICT=FYPGX000 (To budget for W Comp and UI insurance only- Code the F/B IND with an "N" and the PENSION TYPE with a "C")
SRB	Salary Related Benefits – for future use.
TENURE DATE	For probationary tenure status, put the date of the next evaluation. For regular status, this date will be updated every year and used as the employee's next evaluation date for use with running the evaluation date reports (PL31).
STATUS	Tenure status: Certificated employees - input current tenure status code. Classified employees – input probationary status code. Codes are validated against the dictionary. See DICT=PETSA00
TEMP/CAT	Temporary or categorical: This is an optional field. Input "T" if this is a temporary employee or a "C" to indicate if this employee's position is funded by a categorical program.
BRD APPR DTE	Board Approved Date. Optional field. Enter date employee was approved in this position by the Board.
CONTRACT START	Input in MMDDYY format. Enter the date the <u>employee</u> was contracted/hired into this position.
CONTRACT STOP	Input in MMDDYY format. Enter the date the <u>employee</u> terminated in this position. This field should not be entered for active DPEP (code B) records. Position control districts need to pay close attention when entering this date. Once the date is entered, personnel and position control files are immediately updated. In Position control districts this field does not allow changes once entered.
CONDITION	Contract condition describes whether an employee started at the normal time or late in the fiscal year. Your options are: R = Regular and L = Late If using "L" in this field and the late start will be working a regular schedule the following year, code the date field for "Payment start" and "Payment Stop" as you would a regular start employee. The system will only encumber from the contract start date for this year, it will budget a full year for the next fiscal year. When the file is rolled over in June (through the automated PL07 process) the condition field of "L" will be dropped and replaced with an "R".

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

UNITS	Contract units: Indicates the number of days that this employment record normally covers. This field will be filled from the 01 record of the job title dictionary, if one exists. Also, this field may be zero or may be manually updated. The number entered here is used in calculating the annual salary.
PAYMENT START ***	Payment start date: This is the <u>position</u> start date. Input beginning of the first pay period in MMDDYY format.
PAYMENT STOP ***	Payment stop date: This is the <u>position</u> stop date. Input ending of last pay period in MMDDYY format.
PERIODS PAID	Input number of checks the employee is to receive during the fiscal year. Period paid is used in calculating the annual salary for monthly employees and for calculating the month salary for A/D/H employees. This number must equal the months covered in the payment start/stop date fields. NOTE: If the payment start and stop dates don't match the periods paid an error message will be displayed; NBR PAYMENTS NOT EQUAL TO PERIODS PAID
WORKED	Enter number of periods the employee works in the contract year.
INCREMENT DATE	Input date on which employee is to be incremented in MMDDYY format. This date will be rolled over at the end of the fiscal year if there are more steps in the salary schedule. It will be removed when the DPEP record reach the stop step in the salary matrix. If the employee works September through June and moves up on the schedule when they return in September, use a date of July 1.
WORK SCHD	Work schedule: This is an optional field. May be used to report daily hours or number of days per week or number of contractual days the employee works.
CLASS HOURS	Class hours - not an input field. The Seniority hours worked by classified employees will automatically be updated from payroll if the basis, job title and salary schedule of the MGRS screen matches that of the DPEP. See next step.
IND	Class hour's indicator. Must be "Y" in order for hours to be updated automatically. This field will default to an "N" if nothing is entered.
SALARY SCHEDULE *	Works in conjunction with Base Amount field. If a salary schedule is entered, DO NOT input a base amount. If Base Amount is entered, DO NOT input a salary schedule. If both fields are input, the salary schedule will override the amount in the base amount field. No message will be issued for this error. Salary schedules are validated against the matrix. SALM=FY+first three alpha characters of matrix. A salary matrix report (PY01) may be ordered from the JOBR.

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

BASE AMOUNT	Works in conjunction with salary schedule field. This field should be used when there isn't a salary schedule in place. Enter hourly/daily/monthly or annual rate of pay that corresponds with the basis field. If a salary schedule is input, do not input anything into this field. If a base amount is input, do not input into salary schedule field. If both fields are entered, the salary schedule will override the amount in the base amount field. No message will be issued for this error.
BASIS UNITS	Indicates number of periods in the salary calculation. Basis "A" must have basis units of 1.00. Basis "M", it is not necessary to input any number of units. This field is informational only and not used in the calculation of salary amounts. Basis "H or D" must have the annual number of hours/days in order to encumber and budget, salary and benefits properly. If you allow the basis H or D to default to a unit of 1.0 the salary information will be ignored in the budgeting and encumbering process, but these employees will be picked up for calculating payroll fringe benefit vendor warrants. If the employee will be incrementing and is being paid on an hourly or daily basis, these fields must contain the number of units/hours. The first field should contain the hours the person will work before the increment date and the second field should contain the hours/days the employee will work after the increment date.
CALC SALARY AND MONTHLY	Input is not allowed in this field. The annual and monthly amounts are calculated automatically. They are recomputed whenever any one of the fields involved in the computation is changed.
BASIS **	The basis tells the program what kind of salary schedule it's looking at when computing the CALC SALARY AND MONTHLY fields. The options are: A = Annual M = Monthly H = Hourly D = Daily
% OF CONTRACT	Input the percent of time the employee works. This field will default to 1.0. A half time person would be 0.50. Basis "H" must be 1.0.
ANNUAL	Input is not allowed in this field. This amount is automatically computed and recomputed whenever any of the fields involved in the computation are changed.

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

PCT & PCT DISTRIBUTION	May have up to six account distributions. The total of the percents must equal to 100%. To remove a distribution line and percent, set the percent to zero. Once you select the enter key and the screen response is "update is complete", the distribution line will be removed. A valid salary account number must be input for every percent distribution. Duplicate accounts numbers may not be input on the same DPEP screen. All accounts numbers on a single DPEP record must be in the same object range (i.e. 1000's cannot be used with 2000's). Accounts are validated against the budget file.
STIPENDS *	Stipends and stipend dates. May have up to 6 stipends per DPEP record/screen. Input the two character stipend code. These should be the same as the codes used on the MGRS screens for payroll. The stipend can be a flat amount or a percent. Flat amounts must be monthly amounts. Input the date the stipend is to start in MMY format. The calculated monthly amount of the percent stipend will be returned based on the current date. If the screen has an increment date that has already passed, the calculated monthly amount will be the percent of the after increment monthly amount. If the increment date is later than the current date, the calculated monthly amount will be the percent of the before increment monthly amount. Stipends may be put on for future dates outside the fiscal year. A ten year longevity stipend can be coded the day the original DPEP in entered and it will not be calculated until the date arrives ten years from now. The screen will show the description, the percent or amount, the date, and the current calculated monthly amount if the stipend is active.

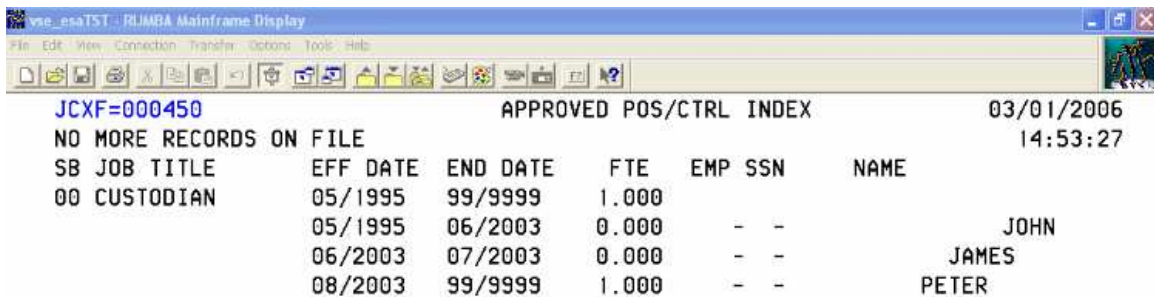
DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

ACTIVATING EMPLOYEES WITH A POSITION CONTROL NUMBER

The following procedure will hopefully prevent errors from occurring when assigning positions to an employee:


Before you activate an employee in personnel via the DPEP you MUST view the JCXF transaction to confirm if an employee is currently assigned to that specific position number. **If an employee is currently assigned to the position then steps need to be taken to inactivate the employee BEFORE you activate the new employee into the position.** Keep in mind that a position may be split between more than one employee but the total should never exceed 1.0 FTE. Below are screen prints of a typical position.

To view the position, type: JCXF=XXXXXX (X=position control number)



SB	JOB TITLE	EFF DATE	END DATE	FTE	EMP	SSN	NAME
00	CUSTODIAN	05/1995	99/9999	1.000			
		05/1995	06/2003	0.000	-	-	JOHN
		06/2003	07/2003	0.000	-	-	JAMES
		08/2003	99/9999	1.000	-	-	PETER

TO LOOK AT MAIN RECORD: TAB TO LINE DESIRED AND HIT ENTER



Ready	Running	APL	ALFIELD	0VR	CAP	NUM	W	1,2	2:53:15 PM
-------	---------	-----	---------	-----	-----	-----	---	-----	------------

If you do not have security access to the position control file then request a copy of this screen from the budget manager before you start activating employees in the personnel system.

DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

DPEP – highlight

Position control is a real time program. If you activate an employee with a contract start date from a previous month the position control system (JCXF) will recognize it as being activated in the current month. This is not an error in the program. It will be evident to the user when they view the personnel screen's contract start and/or start date and the JCXF Effective date and Ending Date. For this reason you should make every attempt possible to activate the employee in the position within the month the employee contract starts/hire date. If that is not possible then the budget manager needs to be informed of the situation so that he can make provisions when reviewing filled and unfilled positions for the district.

The following are step by step instructions:

This screen's primary use is to ensure that payments of benefits reported on the DPFU screen are issued and that salary and related benefits are encumbered. During budget preparation this screen's information is essential to the PL01 process in supplying budget information to the district's budget manager.

An employee may have multiple employment screens. You may keep employment screens for previous positions in addition to a screen for the current position as a way of tracking job history.

Employment screens are summarized on the DPES screen- see page 15.

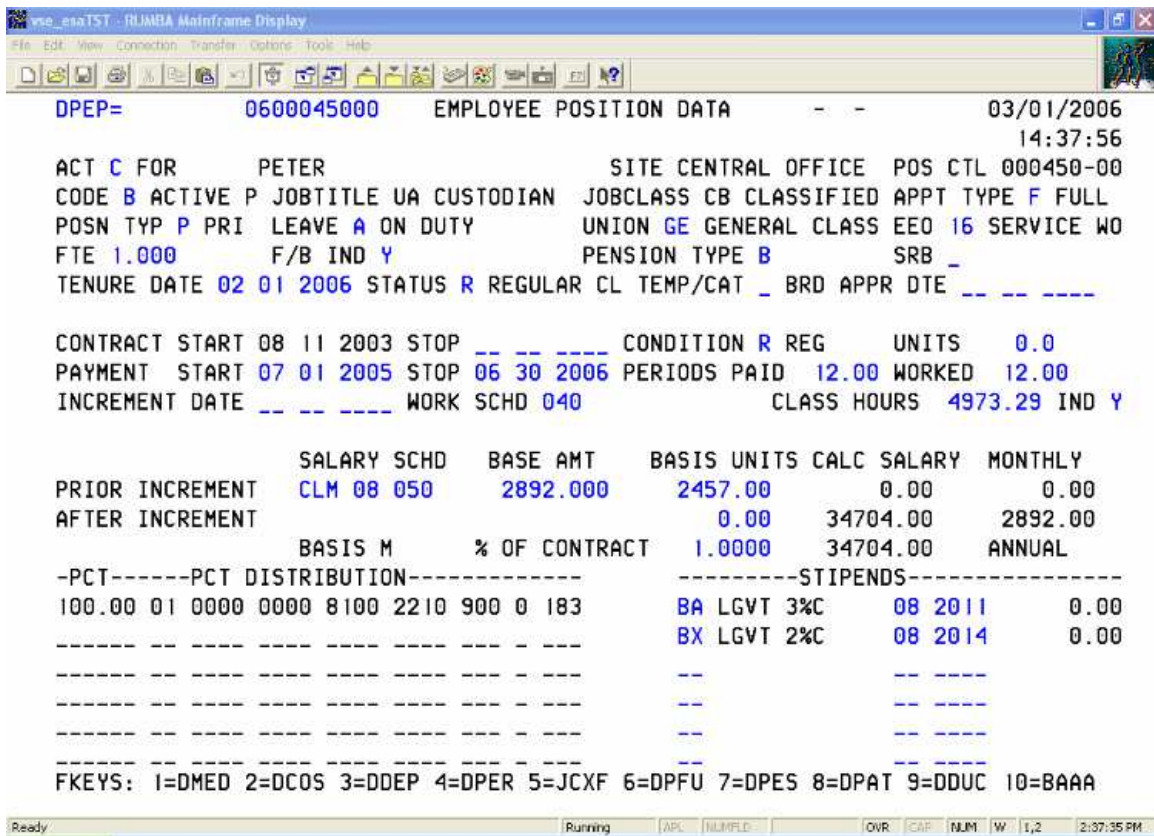
NOTE:

Fields followed by * are brought forward from the position control record (screen). They are only brought forward when a new employment record is added and may be changed on the employment record at any time.

Fields followed by ** are brought forward from the position control record (screen). They are filled in from the corresponding position control screen every time the employment record is brought to the screen and may not be changed.

WARNING: I would like to bring to your attention three fields addressed in the instructions that are not forgiving under position control. They are the CODE and CONTRACT START or STOP DATE fields. Changes are not allowed to be made once they are updated. **Before you update the screen by selecting the enter key, you should review these fields to make sure they are correct. Once you update the information you can not change it!**

DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)



To enter into this screen, type: DPEP=Social Security Number + position control number.

ACTION	Defaults "A" for a new screen, "C" for a screen that is already there, and enter "P" to page to the next screen. To edit this screen you must have a "C" in the action field.
SITE	This field does not allow manual entry. Once the first account number is placed on the DPEP screen under PCT DISTRIBUTION this field will display the school dictionary description as the site code.
POSITION CONTROL **	Automatically entered by the system from the transaction input line. Not available for entry.
CODE	Employment code: See WARNING Gives the current status of the employment record. B = current active. Other codes available can be validated against the dictionary (DICT=PEECX00)
JOB TITLE **	Input Job title. Use title "OZ" for retirement records. Job titles can be found in the dictionary and are validated in this field. See DICT=PCPPX00)
JOB CLASS **	Input classification code. Job classifications can be found in the dictionary and are validated in this field. See DICT=PEJCXX00

DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

APPT TYPE	Appointment type: F = full time or P = other than full time
POSN TYP	Position type: Input one primary DPEP screen as a "P". All other records/screens should be coded "S" for secondary.
LEAVE	Leave status: A = currently active. Leave status codes can be found in the dictionary and are validated in this field. See DICT=PELSX000
UNION **	Input code of union/bargaining unit. Codes can be found in the dictionary and are validated in this field. See DICT=PEUCXX00
EEO **	Equal Employment Opportunity code. Defaults to "98" if not input. Codes are validated against the dictionary. See DICT=PEE5XX00
FTE	Full time equivalent. Input employee's full time equivalency or percentage of time worked.
F/B IND	Fringe benefit indicator. Y = yes, to distribute fringe benefits against these accounts. N = no, do not distribute fringe benefits against these accounts.
PENSION TYPE	Input Pension type. If only WC and UI are to be distributed against this DPEP record, code the F/B indicator field with an "N" and the Pension Type field with a "C". Codes are validated against the dictionary. See DICT=FYPGX000
SRB	Salary Related Benefits – for future use.
TENURE DATE	For probationary tenure status, put the date of the next evaluation. For regular status, this date will be updated every year and used as the employee's next evaluation date for use with running the evaluation date reports (PL31).
STATUS	Tenure status: Certificated employees - input current tenure status code. Classified employees – input probationary status code. Codes are validated against the dictionary. See DICT=PETSX000
TEMP/CAT	Temporary or categorical: This is an optional field. Input "T" if this is a temporary employee or a "C" to indicate if this employee's position is funded by a categorical program.
BRD APPR DTE	Board Approved Date. Optional field. Enter date employee was approved in this position by the Board.
CONTRACT START	Input in MMDDYY format. See WARNING Enter the date the employee was contracted/hired into this position.
CONTRACT STOP	Input in MMDDYY format. Enter the date the employee terminated in this position. This field should not be entered for active DPEP (code B) records. Position control districts need to pay close attention when entering this date. Once the date is entered personnel and position control files are immediately updated. This field does not allow changes.

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

CONDITION	<p>Contract condition describes whether an employee started at the normal time or late in the fiscal year. Your options are: R = Regular and L = Late</p> <p>If using "L" in this field and the late start will be working a regular schedule the following year, code the date field for "Payment start" and "Payment Stop" as you would a regular start employee. The system will only encumber from the contract start date for this year, it will budget a full year for the next fiscal year.</p> <p>When the file is rolled over in June (through the automated PL07 process) the condition field of "L" will be dropped and replace with an "R".</p>
UNITS	<p>Contract units: Indicates the number of days that this employment record normally covers. This field will be filled from the 01 record of the job title dictionary, if one exists. Also, this field may be zero or may be manually updated. The number entered here is used in calculating the annual salary.</p>
PAYMENT START ***	<p>Payment start date: Input beginning of the first pay period in MMDDYY format.</p>
PAYMENT STOP ***	<p>Payment stop date: Input ending of last pay period in MMDDYY format.</p>
PERIODS PAID	<p>Input number of checks the employee is to receive during the fiscal year. Period paid is used in calculating the annual salary for monthly employees and for calculating the month salary for A/D/H employees. This number must equal the months covered in the payment start/stop date fields.</p>
WORKED	<p>Enter number of periods the employee works in the contract year.</p>
INCREMENT DATE	<p>Input date on which employee is to be incremented in MMDDYY format. This date will be rolled over at the end of the fiscal year if there are more steps in the salary schedule. It will be removed when the DPEP record reach the stop step in the salary matrix.</p>
WORK SCHED	<p>Work schedule: This is an optional field. May be used to report daily hours or number of days per week or number of contractual days the employee works.</p>
CLASS HOURS	<p>Class hours - not an input field. The Seniority hours worked by classified employees will automatically be updated from payroll if the basis, job title and salary schedule of the MGRS screen matches that of the DPEP. See next step.</p>
IND	<p>Class hour's indicator. Must be "Y" in order for hours to be updated automatically. This field will default to an "N" if nothing is entered.</p>
SALARY SCHEDULE *	<p>Works in conjunction with Base Amount field. If a salary schedule is entered, DO NOT input a base amount. If Base Amount is entered, DO NOT input a salary schedule. If both fields are input, the salary schedule will override the amount in the base amount field. No message will be issued for this error. Salary schedules are validated against the matrix. SALM=FY+ first three alpha characters of matrix. A salary matrix report (PY01) may be ordered from the JOBR.</p>

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

BASE AMOUNT	Works in conjunction with salary schedule field. This field should be used when there isn't a salary schedule in place. Enter hourly/daily/monthly or annual rate of pay that corresponds with the basis field. If a salary schedule is input, do not input anything into this field. If a base amount is input, do not input into salary schedule field. If both fields are entered, the salary schedule will override the amount in the base amount field. No message will be issued for this error.
BASIS UNITS	Indicates number of periods in the salary calculation. Basis "A" must have basis units of 1.00. Basis "M", it is not necessary to input any number of units. This field is informational only and not used in the calculation of salary amounts. Basis "H or D" must have the annual number of hours/days in order to encumber and budget, salary and benefits properly. If you allow the basis H or D to default to a unit of 1.0 the salary information will be ignored in the budgeting and encumbering process but these employee's will be picked up for calculating payroll fringe benefit vendor warrants. If the employee will be incrementing and is being paid on an hourly or daily basis, these fields must contain the number of units/hours. The first field should contain the hours the person will work before the increment date and the second field should contain the hours/days the employee will work after the increment date.
CALC SALARY AND MONTHLY	Input is not allowed in this field. The annual and monthly amounts are calculated automatically. They are recomputed whenever any one of the fields involved in the computation is changed.
BASIS **	The basis tells the program what kind of salary schedule it's looking at when computing the CALC SALARY AND MONTHLY fields. The options are: A = Annual M = Monthly H = Hourly D = Daily
% OF CONTRACT	Input the percent of time the employee works. This field will default to 1.0. A half time person would be 0.50. Basis "H" must be 1.0.
ANNUAL	Input is not allowed in this field. This amount is automatically computed and recomputed whenever any of the fields involved in the computation are changed.
PCT & PCT DISTRIBUTION	May have up to six account distributions. The total of the percents must equal to 100%. To remove a distribution line and percent, set the percent to zero. Once you select the enter key and the screen response is "update is complete", the distribution line will be removed. A valid salary account number must be input for every percent distribution. Duplicate accounts numbers may not be input on the same DPEP screen. All accounts numbers on a single DPEP record must be in the same object range (i.e. 1000's cannot be used with 2000's). Accounts are validated against the budget file.

DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

STIPENDS *	Stipends and stipend dates. May have up to 6 stipends per DPEP record/screen. Input the two character stipend code. These should be the same as the codes used on the MGRS screens for payroll. The stipend can be a flat amount or a percent. Flat amounts must be monthly amounts. Input the date the stipend is to start in MMY format. The calculated monthly amount of the percent stipend will be returned based on the current date. If the screen has an increment date that has already passed, the calculated monthly amount will be the percent of the after increment monthly amount. If the increment date is later than the current date, the calculated monthly amount will be the percent of the before increment monthly amount. Stipends may be put on for future dates outside the fiscal year. A ten year longevity stipend can be coded the day the original DPEP is entered and it will not be calculated until the date arrives ten years from now. The screen will show the description, the percent or amount, the date, and the current calculated monthly amount if the stipend is active. DICT=PYSTXX00
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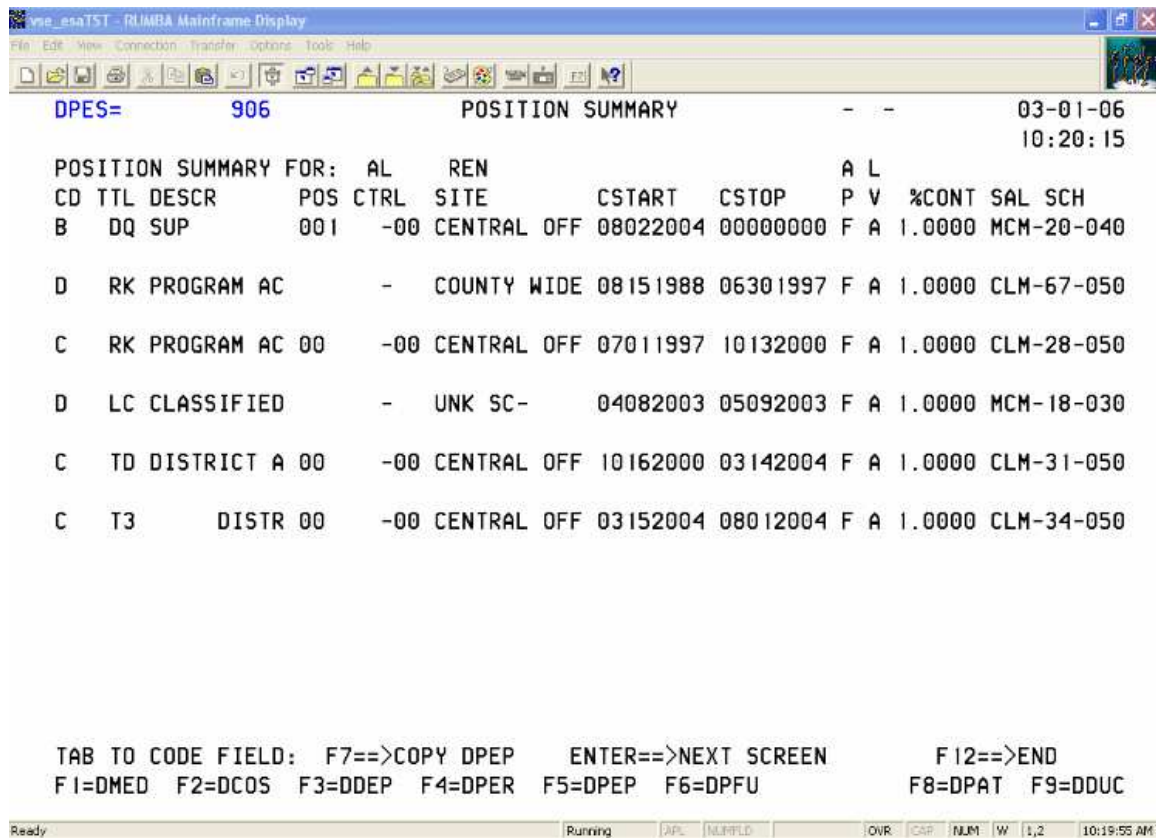
DPEP/ DPES PROCEDURES (EMPLOYMENT DATA)

DPES SUMMARY SCREEN

The DPES screen is the summary screen for all of the DPEP (employment screens)

The screen is sequenced with the current primary (position type) "B" (Employment code) record first (there should only be one "primary B" record active at any given time) followed by all active secondary records finishing with all inactive records by contract date.

This screen can be a valuable tool for reviewing the job history of an employee or transferring to a selected DPEP record. There is also a copy function from this screen which allows you to create a new DPEP record from an existing one.



To enter into this screen, type: DPES=Social Security number + FY or use the function key F7 from the DPEP screen.

**DPEP/ DPES PROCEDURES
(EMPLOYMENT DATA)**

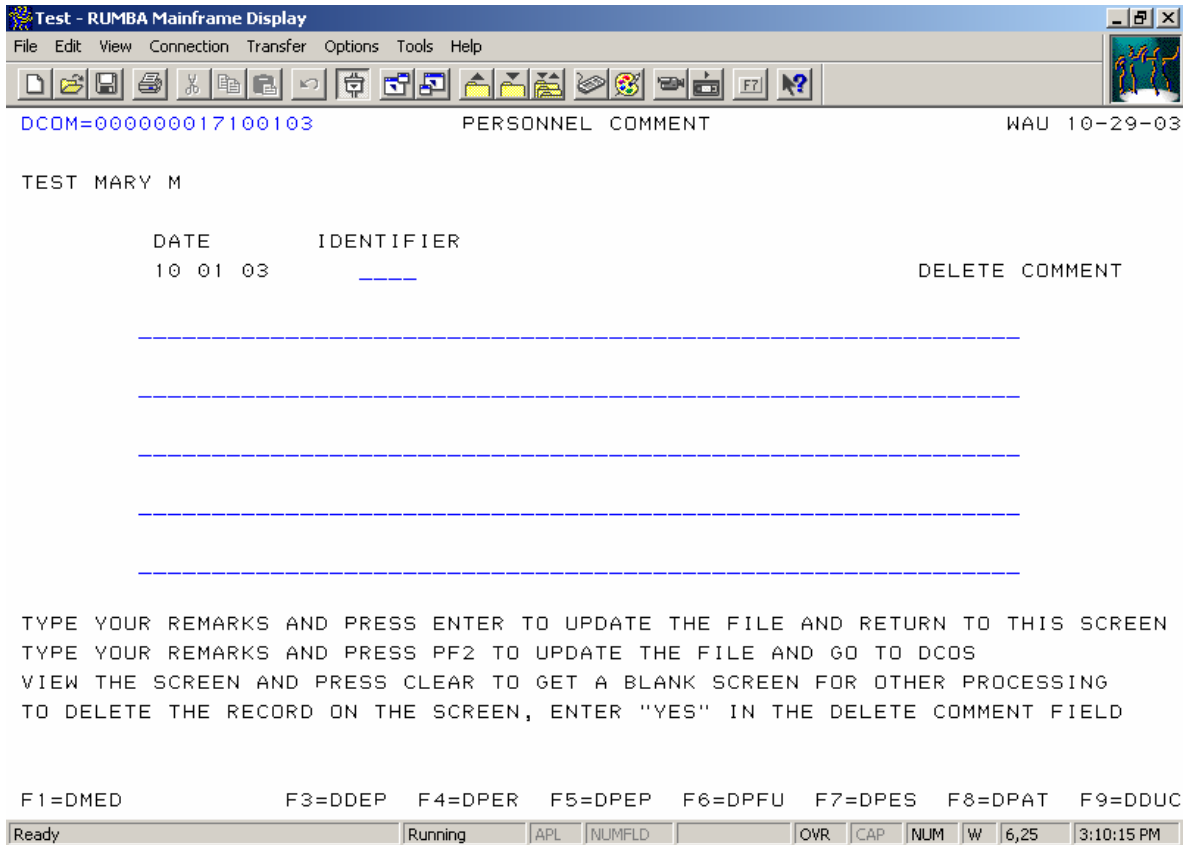
EMPLOYMENT CODE	Gives the current status of the employment record. B = Currently Active.
JOB TITLE	Gives the job title code.
DESCRIPTION	Give the Job Title description from the dictionary record.
POSITION CONTROL	The position control number for this job, if you are using the position control system.
SITE	The dictionary description of the school code in the first account number on the DPEP screen.
CONTRACT START DATE	The contract start date for this job.
CONTRACT STOP DATE	The contract stop date for this job.
APPOINTMENT TYPE	F = Full time P = Other than full time
LEAVE STATUS	A = Currently active. Check your dictionary for other status codes.
% OF CONTRACT	The percent of time the employee works.
SALARY SCHEDULE	Salary schedule for this job as of July 1 of the current fiscal year.

DCOM/ DCOS

(Personnel Comment and Summary Screens)

DCOM

Purpose: To enter confidential employee information in a text file by date and identifier number. An existing record can be modified or deleted. DCOS is the display option for reviewing previous comment files by identifier number or date.



To enter into this screen, type: DCOM=Social Security Number + MMDDYY

Suggestions for this file:

- ❖ Transfer of sick leave from previous school district employment
- ❖ Catastrophic leave situations
- ❖ Complaints
- ❖ Infractions
- ❖ Rewards/accolades

DCOM/ DCOS

(Personnel Comment and Summary Screens)

FIELDS:	
NAME	Name brought in from the personnel file (DPER)
DATE	The date input on the DCOS screen for the comment date. This may be back dated.
IDENTIFIER	Four character, free form field. The field is also optional. The district can use these identifiers to categorize comments, which can then be selected and reported through the Data Warehouse query system. Categories created should be uniformly used by the users and is essential to the success of querying this file through the data warehouse.
DELETE COMMENT	If you wish to delete the comment, type "Yes" in the delete comment field and it will delete the entire comment from the file.
COMMENT	Five lines of 60 characters each, 300 characters total, free form. This is not a word processing screen; changes to comments must be retyped. You cannot use the insert key.

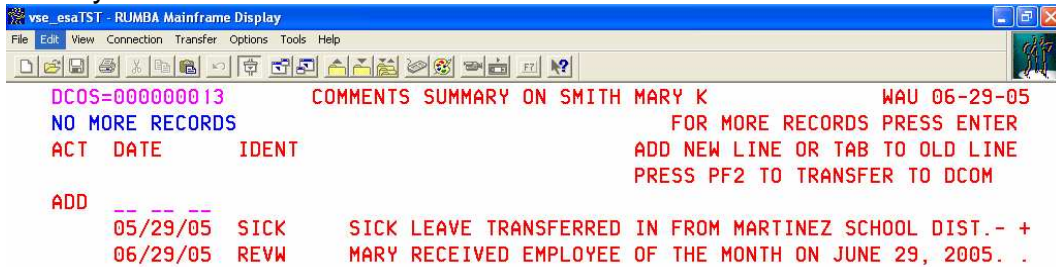
After entering information on this screen you should update by selecting the enter key. You may also update the information by selecting the function key F2; which will update and immediately transfer you to the comment summary screen DCOS.

DCOM/ DCOS

(Personnel Comment and Summary Screens)

DCOS

Purpose: This screen is designed to allow the personnel office to view important information about an employee and keep the history. The DCOS screen is directly connected to the DCOM screen.



To access this screen Enter: DCOS=Social Security Number. To view only certain dates or identifiers for the employee, enter the date (MMDDYY) or identifier after the Social Security number.

To add a DCOM record from DCOS screen; add the Date and select the F2 function key to go to DCOM, enter comment then select F2 key and you're back at DCOS.

ACTION	Action will always equal add.
DATE	Input the date in MDDYY format for which you wish to record the comment, and then select the F2 function key.
IDENTIFIER	This screen displays the category of the comment. This is district determined and should be given special consideration when developing ID codes. Categories should be uniformly used and are essential to the success of querying this file through the data warehouse.
DESCRIPTION	The first line of the comment shows on the summary screen. If the comment is longer than one line, a plus (+) sign will show that there is more information out there to view. Otherwise, if the entire comment fits on the summary screen, it will show a period at the end of the description line.

SALM PROCEDURES (Salary Matrix Screen)

SALM TRANSACTION INSTRUCTIONS:

To begin this transaction enter the transaction code 'SALM', equal sign (=), the fiscal year, and the three-position salary schedule "name." This will bring up the entire schedule (all ranges and steps). If you want to see only one range, enter the two-digit range immediately after the schedule "name."

SALM=FYACE will bring up the entire salary matrix for salary schedule "ACE" for current fiscal year.

SALM=FYACE01 will bring up range 01 only of the salary matrix for salary schedule "ACE" for the current fiscal year. (NOTE: when this option is used, you cannot add steps for any other range)

Once the initial transaction ID has been input, hit the <enter> key.

If the original entry is incorrect, one of the following error messages will appear at the top of the screen:

- "Invalid transaction ident." -the transaction ID is invalid; should be "SALM"
- "Please enter district number" - the character entered for the district number is incorrect
- "Year must be numeric - re-enter" - fiscal year was not entered or was entered incorrectly
- "Must enter schedule (xxx)" - no salary schedule "name" was entered or it was entered incorrectly.
- "Range must be numeric - re-enter - range was input incorrectly

If transaction ID is correct, the screen will return with either:

A blank screen with "A" in the action field - this is an "add", i.e. the salary schedule
or the salary range for the salary schedule is not on file.

If you are trying to change an existing schedule this indicates you have entered the wrong salary schedule.

SALM PROCEDURES (Salary Matrix Screen)

TERMINAL USERS GUIDE FOR UPDATING THE SALARY MATRIX SCREEN:

A filled screen with "C" (change)" in the action field means that this salary schedule or the salary range for the schedule is on file. You can now update the schedule. If you are trying to add a new schedule this indicates you have entered the wrong salary schedule.

FILLING IN THE SCREEN:

ADDING A NEW SALARY SCHEDULE OR A NEW RANGE IN AN EXISTING SCHEDULE:

Fill in all the fields necessary to add the ranges and steps you desire, visually check the screen for correctness and hit the <enter> key. The data is sent to the computer where it is validated. If correct, a message is sent back stating "update complete";

If any field is entered incorrectly, the cursor will go to the field and give an error message. Correct the data and hit the enter key.

Continue this process until "update complete" message is received. (If at any time prior to receiving this message you decide you want out of the screen, hit the <clear> key and no processing will take place).

If you have filled the entire screen, but have more ranges/steps to enter: after last available range/step on first screen is filled hit the <enter> key to add that page. Once your "update completed" message is received, you may enter "p" in the action code to add a new page - action code will be "A" when blank screen is received.

NOTE: it is not necessary that range/step numbers be entered in order; the program will sequence them correctly for you.

CHANGING AN EXISTING SALARY SCHEDULE:

Modify all fields which need to be changed, using the normal field keys and/or the arrow keys to position cursor in correct position. When all fields have been modified, hit the <enter> key. The new screen information will be validated. As in the "add" process, If any field is entered incorrectly, the cursor will go to the field and give an error message. Correct the data and hit the enter key. Continue this process until "update complete" message is received. (If at any time prior to receiving this message you decide you want out of the screen, hit the <clear> key and no processing will take place).

NOTE: It is not necessary that range/step numbers be entered in order; the program will sequence them correctly for you.

Due to the method by which the salary matrix file is updated, you are not allowed to change existing range/step numbers by overlaying the new information in the range/step fields; to accomplish this, you must delete the range/step by entering "del" in the amount field, and enter the new range/step numbers and the salary amount in an open field on the screen. If you are inputting new range/step numbers you may go back and change any field - but only prior to getting "update completed" message.

SALM PROCEDURES (Salary Matrix Screen)

To page through multiple screens on a salary schedule which has 'page' in the bottom right corner, enter 'P' in the action code and hit <enter>. As each new screen is displayed the action code changes to 'C' and you are ready to change the screen. When the last screen has been displayed, 'end' will show in the bottom right corner of the screen. If you have not changed anything in the schedule and you want to return to the first page, hit <enter>.

If you have filled the last screen for an existing salary schedule, but have more ranges/steps to enter: after last available range/step on screen is filled hit the <enter> key to process that page. Once your "update completed" message is received, you may enter "P" in the action code to get a new blank screen - action code will be "A" when blank screen is received.

To delete a step in existing salary schedule range: you must enter "del" in the first three positions of the amount field for that step - entering zeroes in the dollar amount will only change the step amt to zero, which is considered an error; attempting to enter spaces in the range and step will also cause an error.

Example: RNG STP amount to delete:

RNG STP amount 01 130 013000.00 01 130 del000.00

When an existing salary schedule is displayed for update, each new range will begin in the leftmost position of the next available line; this will leave some 'open' range/step/amount fields throughout the display. You may enter new steps for the salary schedule in any open fields on the screen, regardless of range/step sequence. When the updated screen is re-displayed to you, all ranges and steps will be in proper sequence.

When you are working with a salary schedule displayed on multiple screens and you change an item on the second (third, fourth, etc.) screen and hit <enter>, the page you change will be re-displayed to you as updated. If you then wish to return to the first page, hit <enter>.

DELETING AN ENTIRE SALARY SCHEDULE:

To delete an entire salary schedule, enter 'SALM', '=', year, and salary schedule 'name' only (no range). When the screen is returned to you with the schedule, enter 'delete' in the action code ("D" will not work - must enter full word) and hit <enter>. The computer will return a blank screen to you with the message 'delete completed' and an action code of 'A' to add - if you do not want to add new information for this schedule, hit <clear> or enter the next salary schedule you want to update in the key area and hit <enter>.

NOTE: You cannot delete one page only of a salary schedule which is displayed on multiple screens - if you have paged through part of the schedule and enter 'delete' in the action code, the entire schedule is deleted, not the page you have on your screen.

SALM PROCEDURES (Salary Matrix Screen)

DELETING ONE RANGE OF A SALARY SCHEDULE:

To delete one range of a salary schedule, enter 'SALM', '=', year, salary schedule 'name', and range. When the screen is returned to you with the range, enter 'delete' in the action code and (enter). The computer will return a blank screen to you with the message 'delete completed' and an action code of 'a' to add - if you do not want to add new information for this range, hit <clear> or enter the next salary schedule you want to update in the key area and hit <enter>.

ERROR MESSAGES GENERATED FROM INPUT TO SALM SCREEN:

Invalid action: must be 'A', 'C', 'P', or 'delete':

You have entered an invalid action code. Codes must be exactly as shown above.

Correct and hit <enter>.

Range and step must be numeric:

You have skipped over a range or step, or have entered a non-numeric character in one of these fields. Correct and hit <enter>.

Salary amount not numeric - invalid:

You have entered non-numeric information (other than "del") in an amount field. Correct and hit <enter>.

Salary amount cannot be zero - invalid:

You have changed an amount on an existing range/step to zero. Correct or enter "del" to delete step and hit <enter>.

Salary range not equal to range specified in key - invalid:

You initially put a range in the key area, and now are trying to add a step for a different range, or entered the range in error. You must correct the range and hit <enter> to clear this error - then, if you do not want the range/step enter "del" in the amount and hit enter.

Last position of step must be zero for full-step or five for half-step:

Last, or third, position of step must be 0 or 5. If you are using full-step incrementing, enter 0; if you are using half-step incrementing, enter 5.

WARNING MESSAGE GENERATED FROM DISPLAY/INPUT TO SALM SCREEN:

Warning: steps and/or amounts out of sync in range NN: this message indicates that within range NN (number will display)

Either:

Steps are missing - step numbers go from 010 to 030, for example;

OR:

An amount in one step is lower than the amount in previous step - amt for step 010 is 1500.00 and amt for step 020 is 1000.00, for example.

This is a warning only and can be ignored if your schedule is correct as shown on screen. The purpose of this message is to draw the user's attention to "possible" errors.

PERSONNEL SYSTEM PROGRAMS/ REPORTS & HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
ALL ED10'S	EDUCATION UNITS REPORT- Purpose: professional education step and range summary/detail reports. These reports indicate the salary range and the degrees and units earned towards advancement.						
ED10-01	PROFESSIONAL EDUCATION STEP AND RANGE DETAIL REPORT-	X					
ED10-02	PROFESSIONAL EDUCATION STEP AND RANGE SUMMARY REPORT	X					
PA01	ATTENDANCE FILE UPDATE- Attendance Rollover Exception List						X
PA02	ATTENDANCE BENEFIT DAYS REPORT- Purpose: recap of attendance units and remaining balances. Only employees with attendance data will be reported.		X				
PA03	EMPLOYEE ATTENDANCE STATUS LETTER- Purpose: provide employee current status of attendance data by type indicating totals earned, used, transferred and balance.		X				
PA10	EMPLOYEE VAC/SICK/COMP ONLY REPORT Purpose: the personnel file is read and a sick leave report is produced. The districts are selected by district cards. Each district can select sorting by bargaining unit or location. Specific bargaining units or locations may be selected.		X				
PC11	POSITION CONTROL – AVAILABLE FTE'S- Purpose: provide report of available FTE for the month. Also can report excess FTE when employee has contract stop date in the current month and the same or another employee has started on the same position in the current month. Notation "FTE ends in this month" will be printed next to the employee whose contract stop is in report month.	X					
PC12	POSITION CONTROL MONTHLY REPORT- Purpose:provide report of position controlled FTE.	X					
PC13	POSITION CONTROL REPORT BY SITE/GOAL- Purpose: provide report of position controlled FTE by classified and certificated within site.	X					
PL01	SALARY & FRINGE BENEFIT EXCEPTION LIST- Purpose: this program creates a budget line item file (BL01) consisting of both salaries and fringe benefits. PERS reduction line items with off-setting account 8092 can also be created. (See options below). All data is generated using the personnel. File.					X	
PL02	SALARY PROJECTION REPORT- Purpose: this program prints a report in alpha sequence by name within bargaining unit of active employees with the exception of hourly and daily persons having a one (1) in base units.		X				

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL03	UPDATE THE BUDGET FILE WITH SALARY LINE ITEMS- Purpose: this program updates the budget file original budget field with the salary and fringe line items (authorization no. 1-49999) on the line item file.					X	
PL05	BUDGET AND LINE ITEM REPORT FOR PERSONNEL EXPENSE ACCOUNTS + INCLUDES FTE'S (CREATED BY PL01)- Purpose: assist in the budgeting process. Normally used in the first stages of budgeting with PL01.				X		
PL06-01	ENCUMBRANCE EDIT EXCEPTIONS- Purpose: this program uses the personnel file to encumber salaries and fringe benefits on the budget file. Each month it will re-encumber for the remaining months. This means that any changes made to the personnel file during a month will be reflected in the next months' encumbrance amounts.	X					X
PL06-02	ENCUMBRANCE REGISTER- The encumbrance register is a list in sequence by fund, sub fund, and object showing each personnel record used to arrive at the encumbrance amount for that account number.	X					X
PL07-01	PL07-01 PERSONNEL EDIT LISTING- Purpose: The main purpose of this program is to give active records current dates, to step up the salary schedules where applicable, and to reorganize the file dropping all deleted records. In effect this program creates next years' personnel file.						X
PL07-02	PL07-02 PERSONNEL FILE AUDIT REGISTER- Personnel audit listing report is an audit trail of the changes made to the file on the Final run. It is in name sequence.						X
PL08	REORGANIZE THE PERSONNEL FILE- Purpose: this program reorganizes the personnel file after PL07 has been run. No report is produced.						X
PL09-01	EDIT FRINGE BENEFITS- Purpose: This program reads each district's fringe benefit dictionary and selects those fringe benefits whose 09 dictionary records have an "E" in column 20 (warrant selection indicator).						X

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL09-02	REMITTANCE ADVICE FOR MONTH ENDING- Purpose: vendor remittance advice: indicates the period covered i.e.; Prepaid shows next month end and current this month. Columns are name, social security number, coverage description, employee contribution, employer contribution and a DPFU reference. Totals are by contribution type and vendor. Ate type 4 (direct payment) transactions are created for each vendor for entry into the finance system Via MSGB05. The accounts used by these transactions are same fund 90 employee trust fund accounts used by payroll and the same fund 90 employer sub fund accounting accounts used by the distribution portion of the program.						X
PL09-03	DISTRIBUTION OF H/W/OTH FRINGE BENEFITS Purpose: Fringe benefit distribution: a report by district, in sequence by fund, sub fund, major program and name, with totals by sub fund, fund and district. This report portion of the program also produces JE transactions to be input to the finance system via program B05. These are employer only actual Expenses.						X
PL09-04	EMPLOYEE AMOUNTS RECEIVABLE- Employee receivables: this report lists all employee amounts not expected to be covered by payroll deductions. These amounts include amounts shown in the employee amount line (02) on the DPFU screen for retirees and all amounts (employer and employee) for those on leave without pay (leave status greater than /m/).						X
PL10	EMPLOYMENT VERIFICATION LISTING- Purpose: this program will list all employees who are currently working or on leave for the month this program is run. It will list the employee's SSN, name, work location, probation/tenure status code, job title code, position type (primary or secondary), contract factor, job classification, salary schedule, salary, home telephone number, leave status and monthly stipend applicable to the report date.		X				
PL11	PERSONNEL EDIT LISTING- Purpose: this program is an edit of the personnel file. It will edit all demographic, employment and fringe benefit records which are not coded for deletion. If an employee's record(s) does not have any errors they will not be listed. The listing includes name, SSN, 'DPER' status code, the screen which is in error, the job title code for the 'DPEP' screen in error, the fringe benefit code for the 'DPFU' screen in error, the item being edited, and the edit message.		X				X EOY

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL12	EMPLOYMENT HISTORY- Purpose: this program will print the employment history for each selected employee.		X				
PL14-01	PERSONNEL VS. PAYROLL MATCH – MONTHLY EXCEPTION LISTING- Purpose: provide district with a report of unmatched personnel file jobs (DPEP records) and benefits (DPFU records) to payroll systems jobs (MGRS records) and deductions (MDED records) that may affect encumbering process. DPEP salary steps are upgraded based on increment date if present.						X
PL15	PROMOTION LIST- Purpose: this update is run from the personnel file (DPEP screens). It looks at all active “B” DPEP records (annual, monthly, hourly and daily). If there is no increment date the record is bypassed.						X
PL16	PAYROLL CHECK - BUDGET FRINGE BENEFIT REPORT- Purpose: this program is run once per year in October to print employer paid fringe benefits budgeted for employees for the current fiscal year onto employee payroll checks/stubs. Each district has the option to print this information.						X
PL20	CREATE NEW YEAR PERSONNEL DICTIONARY RECORDS - Purpose: this program creates the next year's personnel dictionary records from the current year dictionary.					X	
PL21	CREATE NEW YEAR'S SALARY SCHEDULES - Purpose: this program creates next fiscal year's salary schedules for use in personnel and payroll screens, from the existing salary schedules for current fiscal year. Users must specify current fiscal year and new fiscal year to be created (example: current year=06; new year=07). All existing salary schedules for current fiscal year will be 'rolled over' for the new fiscal year.					X	
PL23	PERSONNEL STATUS LETTER- Purpose: produce a report of personnel and payroll data employee verification. Each page has the data for one employee.		X				
PL25	PERSONNEL CONTRACT DOWNLOAD/REPORT Purpose: produce comma delimited downloadable files for classified and certificated employees that can be used to merge with and create contracts.		X				
PL27	STIPEND EFFECTIVE DATE- Purpose: identify employees who have a stipend that will start in the next 90 days. Prepare a report displaying these employees.		X				

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL28	STIPEND REPORT- Purpose: list all active employees that have a stipend. List employee identification information and stipend information.		X				
PL30	WORK FORCE COMPOSITION- Purpose: provide district with a report of employee and applicant EEO statistics. Employee report is by EEO5 classification and applicant is by job title and contract stop date.		X				
PL31	CLASSIFIED EVALUATION/PROMOTION- Purpose: provide district with a report of probationary and regular classified employees for whom review is or will be due.		X				
PL32	TRANSACTION REGISTER OF SENIORITY HOURS POSTING CYCLE- Purpose: provide district with a report of classified employees calculated class hours for the month and the DPEP class hours total after posting. If the class hours total is not printed, a message (see NARD for messages) prints indicating the reason for not posting.						X
PL33- 01	SENIORITY HOURS BY UNION/EMPLOYEE; CONTRACT STOP DATE- Purpose: provide district with a report of all employees with class hours and those indicated by 'y' in class hrs indicator by union. PL33 - 01 is by employee name and contract stop date.		X				
PL33- 02	SENIORITY HOURS BY JOB TITLE- Purpose: provide district with a report of all employees with class hours and those indicated by 'y' in class hrs indicator by union. PL33 - 02 is by job title and most class hours to least		X				
PL33- 03	SENIORITY HOURS BY UNION; JOB TITLE & CLASS HOURS- Purpose: provide district with a report of all employees with class hours and those indicated by 'y' in class hrs indicator by union. PL33 - 03 is the same as PL33-02 except active employees.		X				
PL34	ATTENDANCE HISTORY FOR FISCAL YEAR- Purpose: provide district with a report of all attendance entries, by attendance type ('y' code) and date for all employees. Summaries.		X				X
PL35	CREDENTIAL FILE DELETION REPORT- Purpose: this program is run once per year to delete any credential records that do not have any matching personnel records. This means the personnel records were deleted but the credential file records were not deleted.						X

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL36	CLEAR CLASSIFIED HOURS AND DAYS REPORT- Purpose: this program is run once per year to clear the classified hours and days fields at fiscal year end. A report is produced showing the data that has been cleared.						X
PL40	CREDENTIAL/ASSIGNMENT MATCH EXCEPTIONS- Purpose: produce a report of the credential /assignments match exceptions. The teachers credential subject and authorization are matched to the class subject and authorization as described in the 7 criteria documented in NARD. Unmatched credentials and classes are listed in the report. Also grade mismatches and credential expirations are listed.		X				
PL41	CREDENTIAL EXPIRATION DATES REPORT- Purpose: produce a report of the credential expiration dates in the district. The credentials are organized by expired, 30, 60, and 90 days.		X				
PL42	CERTIFICATE VERIFICATION DATA- Purpose: produce a report of credential data as requested by districts.		X				
PL43	SALARY UNITS/PROFESSIONAL GROWTH REPORT- Purpose: produce a report from the credential file of credential holders showing only those with salary units, professional growth hours or professional growth hours completed.	X					
PL44	CREDENTIAL/ASSIGNMENT MATCHING FILE REPORT- Purpose: produce a report of the credential /assignments match file data.		X				
PL45	COURSE FILE REPORT- Purpose: produce a report of the courses in a district and the information in the course record.		X				
PL46	INSTRUCTOR ASSIGNMENT REPORT- Purpose: produce a report of assignments for all teachers in the district. Course information is included in the report.		X				
PL47-01	CREDENTIAL CODES FILE LISTING- Purpose: provide report of all codes on the credential codes file. Two reports are produced as follows: 1) credential codes file listing and 2) categories within document type.		X				
PL48	CREDENTIAL LISTING REPORT- Purpose: produce a report of credential data as requested by districts.		X				

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL51	CHANGES MADE TO PERSONNEL FILE – DAILY- Purpose: this program produces a report of all changes made to the PERSONNEL system on a daily basis.						X
PL53	CHANGES MADE TO PERSONNEL FILE – ON REQUEST- Purpose: PL53 reads the cumulative personnel logfile tape created in PL50, selects records for printing based on certain parameters supplied by the user, and prints a report in the same format as the report produced by PL51. This report will include an additional heading line to indicate the parameters used for the run and the district requesting the run.	X					X
PL54	PERSONNEL STATUS UPDATE NOTICE- Purpose: produce reports of changes to personnel status for review by the employee.						X
PL61 A	EMPLOYEE MASTER LISTING- Purpose: PL61 prints three different reports based upon options selected. The first report option is PL61A, “employee master listing”, a report of all employees and certain data on them.	X					
PL61 B	EMPLOYEE HOME ADDRESS LABELS- Purpose: PL61 prints three different reports based upon options selected. The second report Option is “labels” – employee home address labels.	X					
PL61 C	EMPLOYEE SITE LABELS- Purpose: PL61 prints three different reports based upon options selected. The third report option is “labels” again – employee campus labels.	X					
PL62 A	SENIORITY LIST IN SENIORITY DATE ORDER- Purpose: this program will print the seniority report in three different sequences – report PL62A is in order by seniority date.	X					
PL62 B	SENIORITY LIST BY NAME- Purpose: this program will print the seniority report in three different sequences – report PL62B is in order alphabetically by name.	X					
PL62 C	SENIORITY LIST BY JOB CLASSIFICATION- Purpose: this program will print the seniority report in three different sequences – report PL62C is in order by job classification, then seniority date.	X					
PL63 A	STAFF PROFILE BY LOCATION & JOB CLASSIFICATION- Purpose: this program will produce a report of the staff profile. It is broken down into two parts. The first section is a detail list; the second part is a summary of the detail in a matrix format. PL63A - BY LOCATION & JOB CLASSIFICATION	X					

PERSONNEL SYSTEM PROGRAMS/ REPORTS
& HOW TO REQUEST

FAC JOB NUMBER	JOB NAME	JOBR	REQS	MRPT	FRPT	SCHD	SYSTEM GENERATED
PL63 B	STAFF PROFILE BY JOB CLASSIFICATION- Purpose: this program will produce a report of the staff profile. It is broken down into two parts. The first section is a detail list; the second part is a summary of the detail in a matrix format. PL63B - BY JOB CLASSIFICATION	X					
PL63 C	STAFF PROFILE BY LOCATION- Purpose: this program will produce a report of the staff profile. It is broken down into two parts. The first section is a detail list; the second part is a summary of the detail in a matrix format. PL63C - BY LOCATION	X					
PL64	DELINQUENT FINGER PRINT AND PHYSICAL EXAM REPORT- Purpose: this program will print a report of employees who do not have a valid physical exam date or a 'y' in the finger print indicator (both items are from the supplemental demographic screen).	X					
PL66A	PERSONNEL DIRECTORY - 8 1/2 X 11- Purpose: this program will print a directory of employees on file. There are two types of listings available. PL66A - regular directory (8 1/2 x 11) includes name, address, spouse name (optional), phone number, job title, and facility.	X					
PL66B	PERSONNEL DIRECTORY- Purpose: this program will print a directory of employees on file. There are two types of listings available. PL66B – special directory (regular 1 part paper) includes name, address, phone number, job title, and facility.	X					
PL67	TENURE/PROBATION REPORT- Purpose: this program will print a report of active employees who have coded in their 'DPEP' screen in the employment code a 'B' – current or "U" – on leave.	X					
PL68	PRINT TERMINATION REPORT- Purpose: this program will print a report of all terminated employees. NOTE: you must specify termination 'from' and 'to' dates.	X					
PL69	STAFF MATRIX BY AGE- Purpose: this program will print a report of all selected employees and list them by age. NOTE: you must specify 'as of' date when requesting this report. All ages will be calculated from the date given.	X					
PL70	NEXT TB EXAMINATION DUE- Purpose: this program will print a report of employees who have TB examinations due within the dates given. NOTE: you must supply the beginning and ending date range.	X					

INDEX OF PERSONNEL DICTIONARY CODES

This is a list of frequently used dictionary codes that will assist the user when setting up or reviewing personnel screens.

Type exactly the way it is stated with the exception of “FY” dictionary codes, which should be replaced with the actual fiscal year that you are interested in.

This list is designed to allow you online view of codes. It is not a conclusive dictionary list (B16), which is available in hardcopy by request via the JOBR transaction.

TRANSACTION	TO VIEW, TYPE:	SCREEN FIELD DESCRIPTION	COMMENTS
DMED	DICT=PEHC	HANDICAPPED	Handicapped Codes
DPAT	DICT=PEAT	RSN	Attendance Codes
DPEP	JCJT=PCPP	PC JOB TITLE	Position Control Job Titles
DPEP	DICT=PEAS	APPT TYPE	Appointment Classification Codes
DPEP	DICT=PEEC	CODE	Employment Type Codes
DPEP	DICT=PEJC	JOB CLASS	Job Classification Codes
DPEP	DICT=PCPP*000*	JOB TITLE	Job Title Codes
DPEP	DICT=PELS	LEAVE	Leave Status Codes
DPEP	DICT=FYPG	PENSION TYPE	Retirement Pension Codes
DPEP	DICT=PETS	STATUS	Tenure Status Codes
DPEP	DICT=PEUC	UNION	Union Codes
DPEP/MGRS	DICT=PYST	STIPENDS/STP	Stipend Codes
DPER	DICT=SYCC	CITIZEN	Country Codes
DPER	DICT=SYCN	COUNTY	County Codes
DPER	DICT=PEE5	EEO	EE05 Classification Codes
DPER	DICT=SYEC	ETHNIC	Ethnic Codes
DPER	DICT=SYMS	MARITAL	Marital Status Codes
DPER	DICT=PEPS	STATUS	Personnel Status Codes
DPER	DICT=SYST	STATE	State Codes
DPER	DICT=PETC	REASON	Termination Reason Codes
DPFU/MDED	DICT=FYPD*000*	CO DE	Fringe Benefit Codes

K12 PERSONNEL MANUAL 4/28/02 ON LEAVE POSITIONS

PURPOSE:

Besides recording the fact that the employee is on a leave of absence, the function of the "On Leave" record is to allow the encumbering process to disencumber for the period of the leave. It also allows the vendor warrant process to put "on leave without pay" fringe benefit amounts on the receivable report (PL09-04).

DPER

No change to this screen is necessary.

DPEP

On the current active "B" on duty employment record change the "Leave Status" field from an "A" to the LEAVE CODE that describes the condition of the leave. Appropriate Leave codes can be validated by viewing the dictionary record: DICT=PELS or locate your FACB16 personnel dictionary report to view codes.

DPEP

Create an "On Leave" record. Code the DPEP fields just as you did for the employee's regular job EXCEPT put a "U" in the "Employment Code" field and a valid "leave status" code showing the reason for the leave. This should be the same "leave status" code you put in the employee's current active on duty (B) employment DPEP record. Hit enter key to update.

The above steps should be done for every active or on duty "B" employment record from which the employee will be on leave.

DPFU

No change for this record is necessary unless you need to modify the benefits the employee will be receiving while on leave.

What happens to encumbering (PL06) for on leave records:

In the "U" DPEP, leave status codes indicating "without pay" create a negative encumbrance to be applied against the positive encumbrance created by the "B" DPEP as seen on the PL06 register. For instance, if you had a "B" record for a teacher (pay start of 9/1/01; pay stop 6/30/02) and a matching DPEP "U" record for the same teacher (pay start 11/01/02; pay stop 12/01/02); the system would encumber for 10 months of salary and disencumber for two months equaling a net of 8 months of encumbrance.

K12 PERSONNEL MANUAL 4/28/02 ON LEAVE POSITIONS

Year end ROLL OVER (PL07) for on leave records:

The system will change the "On leave" records with a "U" to a "D" (prior position) and the accounts and percents are dropped.

All "B" code records will have their leave status changed back to an "A" for on duty.

To delete an on leave record:

DPEP

Bring up the DPEP screen and change the "U" code to an "*", which will delete the record at the fiscal year end "rollover" PL07 process. Or leave the "U" code as it stands but enter the appropriate date in the contract stop date and the record will remain for history purposes but will not be active. Hit enter key to update.

DPEP

Bring up the "B" code record and change the leave status back to an "A" for on duty.